A message from our CEO & BOARD CHAIR

Laurie George, Ph.D.  President & CEO
Kim Jones  Chair, Board of Directors

United Way fights so that everyone in Palm Beach County can have access to the basics: a quality education, a safe place to sleep, financial stability, good medical care, and enough to eat.

We also take a leadership role when disaster strikes. This past year, we sprang into action before, during and after Hurricanes Irma and Maria. While we were fortunate to be relatively unscathed here in Palm Beach County, there was still a lot of work to be done in our community and to assist our neighbors in the Keys, on the West Coast and in the Caribbean Islands.

The ways we collaborated with partners across all sectors of the community for Hurricane Irma relief is the same way that United Way leverages important relationships year-round to solve community issues in the most impactful way possible. Whether it is during a natural disaster, working to increase the number of seniors receiving home delivered meals or matching youth with life-changing mentors, United Way is always collaborating to make dollars go further and help even more of our residents who need it most.

This year we raised more than $16 million dollars to meet our community’s greatest needs, but what’s important to note is that the actual impact and reach of those dollars exceeded $22 million, helping a quarter of a million of our friends and neighbors.

This is one of many reasons why our United Way has been identified as one of the top 15 out of 1,200 United Ways in the United States for efficiency, performance and growth! We are very proud of all our staff and volunteers have accomplished to fulfill our mission and we couldn’t have done it without the support of our generous donors!

Guiding Principles and Values

United Way staff and volunteers adhere to these guiding values:

Caring | Inspiring | Approachable
Trustworthy | Dynamic | Results-Oriented
Innovative
YOUR 2017-18 INVESTMENT REPORT
90% OF DONATIONS STAY LOCAL

United Way increases our community’s capacity to care for our neighbors.

$16.4 million raised by more than 100,000 donors

$22 million combined economic community impact

90% of the $16.4 million stayed in Palm Beach County

86 programs and special projects provided by 52 nonprofit partners

1 in 5 residents accessed United Way funded programs and services

2,713 individuals and children received medical equipment

4,811 youth matched with mentors

10,204 tax returns filed for free

1 million+ summer meals served to children

2,650+ home-bound seniors received delivered meals
### Statements of Financial Position • June 30, 2018 and 2017

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total current assets</td>
<td>$4,997,568</td>
<td>$6,755,814</td>
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<tr>
<td>Total non-current assets</td>
<td>12,415,201</td>
<td>11,934,667</td>
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<tr>
<td><strong>Total assets</strong></td>
<td><strong>$17,412,769</strong></td>
<td><strong>$18,690,481</strong></td>
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<tr>
<td>Total current liabilities</td>
<td>$5,296,866</td>
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<td>Total non-current liabilities</td>
<td>52,720</td>
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<td><strong>Total liabilities</strong></td>
<td><strong>$5,349,586</strong></td>
<td><strong>$6,837,275</strong></td>
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<tr>
<td>Net assets</td>
<td>12,063,183</td>
<td>11,853,206</td>
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<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$17,412,769</strong></td>
<td><strong>$18,690,481</strong></td>
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</tbody>
</table>

### Statements of Activities • Years Ended June 30, 2018 and June 30, 2017

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and grants</td>
<td>$16,494,901</td>
<td>$15,002,453</td>
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<tr>
<td>Other revenues</td>
<td>369,025</td>
<td>403,327</td>
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<tr>
<td>Gross revenues</td>
<td>16,863,926</td>
<td>15,405,780</td>
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<tr>
<td>Program costs</td>
<td>14,284,749</td>
<td>12,295,813</td>
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<td>Fundraising costs</td>
<td>1,777,941</td>
<td>1,557,763</td>
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<tr>
<td>Management and general costs</td>
<td>1,106,740</td>
<td>1,180,768</td>
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<tr>
<td><strong>Total expenses</strong></td>
<td><strong>17,169,430</strong></td>
<td><strong>15,034,344</strong></td>
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<tr>
<td>Change in net assets</td>
<td>(305,504)</td>
<td>371,436</td>
</tr>
<tr>
<td>Net unrealized gains</td>
<td>515,481</td>
<td>848,269</td>
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<tr>
<td>Net assets, beginning of year</td>
<td>11,853,206</td>
<td>10,633,501</td>
</tr>
<tr>
<td><strong>Net assets, end of year</strong></td>
<td><strong>$12,063,183</strong></td>
<td><strong>$11,853,206</strong></td>
</tr>
</tbody>
</table>

*The financial information presented has been derived from United Way of Palm Beach County's audited financial statements and IRS form 990. An audit was conducted by Daszkal Bolton LLP, who expressed an unqualified opinion. Partner agencies receiving designations from United Way of Palm Beach County's campaign are charged an administration fee based upon amounts received in accordance with United Way Worldwide guidelines.*
2018

**EXPENSES**
- Agency Funding & Program Costs: 82.6%
- Fundraising: 10.7%
- Management & General: 6.7%

**REVENUE**
- Campaign Revenue: 27.5%
- Grants: 6.7%
- Pledge Processing Fees: 4.1%
- Investment Earnings: 0.8%
- Other Revenues: 2.2%

2017

**EXPENSES**
- Agency Funding & Program Costs: 81.5%
- Fundraising: 10.5%
- Management & General: 8.0%

**REVENUE**
- Campaign Revenue: 20.5%
- Grants: 6.7%
- Pledge Processing Fees: 6.7%
- Investment Earnings: 2.2%
- Other Revenues: 0.7%
The Palm Beach County Hunger Relief Initiative’s Advisory Committee, comprised of leaders from local foundations, businesses and human service agencies, United Way of Palm Beach County, Palm Beach County government, and the School District of Palm Beach County continues to guide four workgroups that are focused on achieving the goals outlined in the Hunger Relief Plan. These goals focus on the areas of Childhood Hunger, Senior Hunger, Infrastructure and the Glades region.

The Plan is data driven by various studies that mapped assets available to the food insecure such as pantries, weekend backpack programs, congregate meal sites for seniors, Women, Infants and Children (WIC) and Supplemental Nutrition Assistance Program (SNAP) participating organizations, Summer BreakSpot and many others.

For more information visit UnitedWayPBC.org/Hunger
Special Needs snapshot

**GOAL**
Enhancing the quality of life for families with children who have a disability

**JULIE’S STORY**
United Community Options – Respite Program

Julie, a single mom working full time, was seeking help for her 4-year-old son who has sleep apnea and ADHD. She showed signs of exhaustion from going right from work to picking up her son. The staff from a local United Way funded program recognized that she needed assistance from an in-home respite program. This would allow her time to rest while a trained respite sitter would take care of her son. With the quality care her son was receiving, and the new energy she had from getting more rest, she was able to find her son a specialist to assist with his sleep apnea as well as a behavioral therapist. Julie’s life has changed from the support that she receives from the respite program funded by United Way of Palm Beach County.

90% of all program outcomes were met or exceeded

- Programs: 7
- Clients served: 1,007
- Volunteers: 103
- Volunteer hours: 220
- Volunteer in-kind value: $5,432

Housing & Homelessness snapshot

**GOAL**
Individuals and families achieve housing stability

**ROBERT’S STORY**
The Lord’s Place – Operation Home Ready Program

Robert had been living on the streets for years, struggling with physical and mental health issues. Despite his challenges, Richard was determined to take control of his life. He began meeting regularly with a case manager to address his barriers to stability and enrolled in several of The Lord’s Place’s supportive services, where he received the appropriate medical treatment. With their support, he completed a job readiness course and continued to participate in vocational training at the Lord Place’s thrift store. Robert’s learning and growth enabled him to graduate from the program and become an employee there. With stable housing, steady income, employer-provided health insurance, and a newly purchased car, Robert is looking forward to continuing his success. Stories like Robert’s are made possible through the funding received from United Way of Palm Beach County.

86% of all program outcomes were met or exceeded

- Programs: 8
- Clients served: 1,460
- Volunteers: 82
- Volunteer hours: 291
- Volunteer in-kind value: $7,185
Graduate & Thrive snapshot

GOAL Support youth so they graduate from high school and succeed in life

$1,254,359 Invested

MARIE’S STORY
Achievement Centers for Children and Families – After School Teen Program

Marie was born in Port-au-Prince, Haiti. She was just 3 years old when her family was caught in the catastrophic 2010 Haiti Earthquake. Marie and her family were left to sleep on the street immediately following the earthquake. Thankfully, arrangements were made that allowed Marie and her family to move to Delray Beach. When she came to the Achievement Centers for Children and Families’ afterschool program, it was clear that the trauma had left a mark on young Marie. It wasn’t long before she began talking and letting her creative personality shine. Marie is now 12 years old, loves reading and is an Honors student and an active member of ACCF’s Teen Girls’ Club where she participates in life skills, etiquette, and arts workshops. ACCF and United Way are proud to have played a small role in Marie’s achievements and success.

82% of all program outcomes were met or exceeded

23 Programs
20,106 Clients served
1,547 Volunteers
5,800 Volunteer hours
$143,202 Volunteer in-kind value

Access to Care snapshot

GOAL Increase access to health insurance and comprehensive healthcare services

$726,175 Invested

YOLANDA’S STORY
Healthy Mothers Healthy Babies – Prenatal Care Coordination Program

Yolanda came to this country alone with her two young daughters, fearing for her life because of her high-risk pregnancy. Within 24 hours of arriving, she had her first appointment with a counselor from Healthy Mothers, Healthy Babies. The organization helped her with insurance, find clothes and food for her daughters, and even located a shelter for them to stay in. Staff from the organization did everything they could to connect Yolanda and her family to more stable housing. In her words, “When I needed a village, Healthy Mothers, Healthy Babies supported me.” United Way of Palm Beach County is honored to provide critical funding to this program that helps families thrive.

85% of all program outcomes were met or exceeded

12 Programs
13,644 Clients served
150 Volunteers
360 Volunteer hours
$8,888 Volunteer in-kind value
Financial Stability snapshot

GOAL
Households increase income, build savings and grow assets

$768,789
Invested

JOHN’S STORY
The Arc of the Glades – Facility-Based Employment Program

John has actively participated in programs at The Arc of the Glades for many years. To increase his employment skills and independence, John has received training on daily living skills, financial literacy, and has gained valuable work experience with the janitorial and lawn maintenance crews. He has overcome many obstacles and has not let his intellectual or physical disabilities stop him from achieving his goals. John now has his own lawn maintenance service in his neighborhood. He has been approved for Supported Living and is currently seeking affordable housing with the assistance of his coach. With the continued support of The Arc of the Glades through United Way of Palm Beach County funding, John is well on his way to making his dreams a reality.

94% of all program outcomes were met or exceeded

7
Programs

12,396
Clients served

185
Volunteers

7,261
Volunteer hours

$179,274
Volunteer in-kind value

Special Initiatives snapshot

GOAL
Support initiatives providing help to individuals and nonprofit organizations during a crisis, as well as building organizational capacity

$1,035,949
Invested

Providing Help During a Crisis
• 211 Helpline
• Disaster Relief & Recovery

Building Nonprofit Capacity
• Legal Aid Society - Nonprofit Legal Assistance Program
• Nonprofits First - Agency Accreditation
• Continuous Improvement Initiative
**Mentor Center snapshot**

**GOAL** Support youth so they graduate from high school and succeed in life

$1,051,577 Invested

**JAMES AND CHRISTOPHER’S STORY**
American Association of Caregiving Youth’s Mentor Program

James was matched with his mentee, Christopher who had started high school and was falling behind academically. They met every other week after school and James also arranged for Christopher to get the tutoring help that he needed through AACY. Many times he took Christopher to his office to shadow him throughout part of the day. Christopher is now doing well in school and received a Certificate of Recognition for academic achievement. With the support of his mentor, the ACCY, and the funding provided by United Way of Palm Beach County, Christopher’s life is forever changed for the better.

93% of all program outcomes were met or exceeded

- 14 Programs
- 1,088 Matches
- 3,313 Volunteers
- 156,048 Volunteer hours
- $3,852,825 Volunteer in-kind value

**Fight Hunger snapshot**

**GOAL** Households have increased access to nutritious foods

$489,814 Invested

**DEAN’S STORY**
CROS Ministries Community Food Pantry Program

Earlier this year, Dean visited a CROS Food Pantry in a bad state. He was complaining of severe headaches and had not eaten in several days. CROS Ministries volunteers were quickly able to provide him some nutritious ready-to-eat food and gave him information on a local healthcare agency to receive assistance for his headache and other ailments. A few months later, Dean paid the food pantry another visit. This time, he came to say thank you for the help he received from the volunteers at CROS Ministries. Dean now has a job and is on his way to getting back on his feet.

88% of all program outcomes were met or exceeded

- 8 Programs
- 20,762 Clients served
- 915 Volunteers
- 2,320 Volunteer hours
- $57,281 Volunteer in-kind value
Comprised of diverse partners from across all sectors of Palm Beach County, including local business, nonprofit, government and educational entities, Achieve Palm Beach County is focused on ensuring that every student in Palm Beach County has the support he/she needs to get a post-secondary credential and be career-ready. Based on research and community input, the initial priorities of Achieve Palm Beach County include parent engagement and support, post-secondary advising for high school students, Free Application for Federal Student Aid (FAFSA) completion, and scholarships and support services for post-secondary students.

Through strategic collaboration and the hard work of community-led teams, Achieve Palm Beach County is successfully utilizing a collective impact approach to ensure post-secondary access and completion for many underserved Palm Beach County middle and high school students.

For more information visit AchievePBC.org
MISSION
To attract, enlighten and rally early to mid-career professionals around United Way of Palm Beach County by creating a society of like-minded individuals who believe in giving back financially, while being able to network and participate in community service projects and educational opportunities.

You will CONNECT with other entrepreneurs, business people and executives who share a common goal: to make an impact. Membership creates opportunities to SERVE at volunteer projects and agency tours. By becoming a member of this select group, you will LEAD the way for others to become inspired about all the good United Way of Palm Beach County does in the community.

MISSION
To build and foster a powerful, passionate network of women who create impactful change in our community through the focused investment of their time, talent and resources.

United Way’s Women United strives to:
► EDUCATE women about our community’s most pressing needs.
► ENGAGE women as philanthropic leaders and active community investors.
► EMPOWER women to be a part of positive change in our community.
GLEANING Crops

READ Across America
EXCEPTIONAL INDIVIDUALS
CHANGING LIVES AND TRANSFORMING COMMUNITIES

The Tocqueville Society is one of our community’s most prestigious and effective philanthropic organizations with members investing a minimum of $10,000 annually. Society members are leaders who collectively tackle some of Palm Beach County’s biggest issues.

MILLION DOLLAR ROUNDTABLE
$1,000,000 and above (Cumulative Giving)

Countess Henrietta de Hoernle*
Mrs. Sara Jo Kobacker
Mrs. Mary Ann Perper
Mr. John F. Scarpa
Mr. and Mrs. Raymond Zimmerman

NATIONAL SOCIETY
$100,000 - $999,999 (Annually)

Mrs. Sara Jo Kobacker
Mr. and Mrs. Raymond Zimmerman

ORDER OF EQUALITY
$50,000 - $74,999

Anonymous

ORDER OF LIBERTY
$25,000 - $49,999

Anonymous
Mr. Robert M. Beren
Mr. and Mrs. Stephen and Gabriella Demeritt
Mr. and Mrs. George Giguere
Mr. and Mrs. William J. Gilbane, Jr.
Mr. James Robo
Mrs. Ramona Ann Spears
Mr. and Mrs. Frank E. Walsh

ORDER OF INDEPENDENCE
$15,000 - $24,999

Anonymous (x2)
Ms. Trudy Crowetz
William and Mary Donnell
Mr. George T. Elmore
Mr. and Mrs. Brett and Brijin Frazee
Judith and Tom Giuffrida
Mrs. Martha B. Hartfiel
Ms. Karen Leikert
Mr. and Mrs. Brand and Pamela Meyer
Mr. Stephen C. Moore
Lee and Jenny Owen
Mr. Armando Pimentel
Del and Barbara Williamson

SOCIETY MEMBERS $10,000 - $14,999

Anonymous (x2)
The Azrieli Foundation
Mr. Miguel Arechabala
Mr. and Mrs. Barney Barnett
Gene and Joyce Bolton
Mr. Larry E. Brown
Mrs. Fabiola Brumley
Mr. Dan Cane
Mrs. Deborah H. Caplan
Christine and Larry Carsman
Mr. and Mrs. Alexander R. Castaldi
Ms. Denise Crumm
Ms. Julie Fisher Cummings
Ms. Edith Di Francesco
Frank and Helga Doyle
Michael T. and Ruth Ann Dunn
Ray and Nancy Faloona
Mr. Alfonso “Alfy” Fanjul
Mr. Jose “Pepe” Fanjul
Tricia and David Foley
Madeline and Sidney Forbes
Mr. Sam A. Forrest
David and Judy Frey
Dr. Laurie J. George
Mr. Cary Ginter
Kenneth L. and Summer J. Groves
Gursahaney Family Foundation
Lew and Sherry Hay
John and Michelle Ketchum
Mr. Berton Korman
Dr. Rene Lerer
Robert, Jon, and Lori Levinson
Mr. Mark Maisto
Mr. John Marasco
Arthur and Susan Menor
Ms. Kimberly R. Mullins
Mr. and Mrs. Jack Nicklaus
Ms. Heather Nisbeth
Mr. Steve Nudelberg
Mr. and Mrs. James E. Perrella
Ms. Christine Petranchuk
Nancy and Steve Schwartz
Mr. Greg Seelagy
Mr. Eric Silagy
Mr. Lawrence Silverstein
Mr. Jeffrey Sopshin
Mr. and Mrs. William Striebe
Mr. Jim Strathmeyer
Mr. Robert Thibault
Mr. Paul S. Tischler
Mr. Keith A. VanderVeen
Mr. and Mrs. Roger Walcott
Mr. Peter Wellman
Meryl and Charles Witmer
Mr. William L. Yeager

As of June 2019

*Deceased
OUR MISSION
To ensure that everyone in Palm Beach County has access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat.
United Way of Palm Beach County

**Trustworthy.** For 90 years, United Way of Palm Beach County has served as the trusted local leader, identifying and addressing our community’s most critical needs.

**Efficient.** Our team of community investment experts monitor United Way funded programs, ensuring targeted results are achieved. Donors can be assured that their dollars are being put to work in the best way possible, where they are needed the most.

**A Champion.** We fight for those who do not have a voice and support the nonprofits that serve them. By uniting key stakeholders and local leaders, we provide strategic solutions to community challenges.

UnitedWayPBC.org

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