To improve measurably the lives of individuals and families in Palm Beach County by uniting the resources of donors, volunteers, agencies and the community.

United Way of Palm Beach County
2015-16 Board of Directors

United Way of Palm Beach County is a volunteer-driven organization representing our entire county. From the Board of Directors to community impact volunteers, and the hundreds of others who lend a hand each year, volunteer leaders ensure United Way of Palm Beach County continues to make a measurable difference in the lives of people in need in our community.

Executive Committee

Chairman
DONALD L. KISELEWSKI, JR.
NextEra Energy, Inc.

Chairman Elect
Strategic Planning Committee Chair
EARNEE ELLISON, JR.
Ellison Consulting Group, LLC.

Immediate Past Chairman
JOSEPH B. SHEAROUSE, III
First Bank of the Palm Beaches

Secretary
MARTA H. CASAS - CELAYA
Comcast

Treasurer
STEPHEN MCDERMOTT
Gunster

Member At Large
ARTHUR J. MENOR, Esq.
Shutts & Bowen LLP

Member At Large Emeritus
JOHN F. FLANIGAN, Esq.
Haile, Shaw & Pfaffenberger, P.A.

Legal Counsel
DANET RODRIGUEZ-FIgg, Esq.
Shutts & Bowen LLP

Community Impact Committee Chair
JOHN FISCHETTI
Sikorsky Aircraft

Volunteer Committee Chair
TALLA MCGAHEE
Publix Super Markets, Inc.

Resource Development Chair
KIM JONES, PHR
Celadinas Insurance Group

President & CEO
LAURIE GEORGE, Ph.D.
United Way of Palm Beach County

Board of Directors

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Regions Bank

RYAN BEISER
PNC Bank

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Boys Town South Florida

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Fox Rothschild LLP

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Bank of America Merrill Lynch

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Modernizing Medicine

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REL Enterprises

HEATHER NISBETH
EY

OWEN O’NEILL
Clinics Can Help

KEITH RICHARD OSWALD
The School District of Palm Beach County

MICHAEL PUMO
CBS 12 NEWS - WPEC

GAIL D. RAY
Deloitte

ANTHONY ROBINSON
Community Volunteer

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NextEra Energy, Inc.

DARRELL SEARCY
Chandler Campbell & Daschle

MICHAEL B. SPEARS
NCCI

ALLISON D. TAYLOR
Deloitte

RICKY WADE
“B”ing the Best

LISA WILLIAMS - TAYLOR, Ph.D.
Children’s Services Council of Palm Beach County

2015 - 2016
ANNUAL INVESTMENT REPORT

United Way of Palm Beach County

477 S. Rosemary Ave., Suite 230 | West Palm Beach, FL 33401 | 561.375.6600

Thank You
FOR NEARLY 90 YEARS, UNITED WAY OF PALM BEACH COUNTY HAS SERVED AS THE TRUSTED LOCAL LEADER IDENTIFYING AND ADDRESSING OUR COMMUNITY’S MOST CRITICAL NEEDS.

United Way is one of the largest fundraising organizations in Palm Beach County and it’s unique in the fact that it’s also a funder of other local nonprofits. Of the $15 million raised annually, 90% is invested right back into the community in a variety of meaningful ways, including 86 local nonprofit programs that are sustainable and producing lasting results. One in five residents, a quarter of a million people, participate in at least one United Way funded program - that’s your colleague, neighbor, friend or family member.

United Way of Palm Beach County funded programs fight for: access to health care, housing for the homeless, mentors for children, financial stability for families, food for the young and senior population, assistance for people with special needs, and helping kids graduate and thrive.

A team of volunteer experts monitor these investments ensuring that outcomes of the funded programs are met and targeted results are achieved. This exemplifies United Way’s longstanding reputation as being a trustworthy and efficient organization. Donors can feel good knowing their dollars are being put to work in the best way possible, where they are needed the most.

UNITE IN THE FIGHT to Improve Palm Beach County

HUNGER RELIEF PLAN

This past year, the Hunger Relief Plan partners have been working hard to create the strong foundations needed to build lasting change using a collective impact model. Nearly 100 volunteers, representing all sectors of our community, have been devoted to implementing tactics and strategies from the Hunger Relief Plan in the areas of senior and childhood hunger, infrastructure and the Glades community. Coordination and collaboration are particularly important for the success of our work.

In March of 2016, four workgroups began implementing strategies and tactics:

- Childhood Hunger
- Senior Hunger
- Glades Hunger
- Infrastructure

THIS YEAR’S SUCCESSES

Backpack Program
Served 1,237,600 meals to 3,400 children.

Home Delivered Meals
Served 1,012 seniors 263,120 meals.

Group Meals
Served 2,894 people 752,440 meals.

Summer Breakspots
Served 1,022,099 meals.

WE HAVE MORE THAN 200,000 RESIDENTS, 64,000 OF WHOM ARE CHILDREN, WHO DON’T HAVE ENOUGH TO EAT ON A DAILY BASIS. TOGETHER, WE CAN CHANGE THAT!
90% OF DONATIONS STAY LOCAL

To be certain that funds are used to address our community’s most pressing issues, United Way staff and volunteers hold annual community conversations with stakeholders across all sectors. These conversations uncover emerging needs that require immediate attention. United Way has invested in more than 86 programs and numerous special projects that strategically address those needs. All funded programs are vetted and tracked to verify sustainability and effectiveness. These metrics can then be compared with community indicators, such as graduation rates and hunger, to demonstrate where we are making a difference and where there are still gaps in services.

“"We make a living by what we get, but we make a life by what we give."" - Winston Churchill

Corporate Volunteerism

Does your company demonstrate corporate social responsibility? Statistics show that consumers are attracted to companies that are responsive to local needs. Ultimately, focusing attention on social responsibility enhances your business.

United Way of Palm Beach County’s Corporate Involvement Program is a resource your company can use to demonstrate social responsibility right here in your community.

UnitedWayPBC.org

FINANCIAL ACCOUNTABILITY

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.

Join the next generation of philanthropic leaders

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.

BEHIND EVERYTHING WE DO, THERE ARE PEOPLE LIKE YOU WHO MAKE IT HAPPEN.

WOMEN’S LEADERSHIP COUNCIL
EDUCATE. ENGAGE. EMPOWER

Celebrate the power of women to bring about positive change
Community investment is United Way’s business. By making a leadership gift, you join the thousands of other concerned people who trust in United Way to make that impact and produce smart solutions to meet the needs of the community. A leadership gift of $1,000 annually is your investment in what matters – lasting results.

Benefits of the Leadership Circle

- Demonstrates your leadership and commitment to your community.
- Gives you the opportunity to make a significant and lasting impact.
- Inspires others to follow.
- Your gift is multiplied when combined with others.
- Exclusive Invitation to quarterly DINE UNITED lunches, tours and recognition events.

A LEADERSHIP GIFT IS YOUR INVESTMENT IN WHAT MATTERS – LASTING RESULTS.

DINE UNITED Lunch and Tour

Exclusive opportunities to experience United Way funded programs first hand. Tour a partner agency and learn how your investment is making a difference.

**Statements of Financial Position • June 30, 2016 and 2015**

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total current assets</td>
<td>$7,929,401</td>
<td>$7,877,200</td>
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<tr>
<td>Total non-current assets</td>
<td>11,294,144</td>
<td>9,445,568</td>
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<tr>
<td>Total assets</td>
<td>$19,223,545</td>
<td>$17,322,768</td>
</tr>
<tr>
<td>Total current liabilities</td>
<td>$8,529,718</td>
<td>$8,067,007</td>
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<tr>
<td>Total non-current liabilities</td>
<td>60,326</td>
<td>64,004</td>
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<tr>
<td>Total liabilities</td>
<td>8,590,044</td>
<td>8,131,011</td>
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<tr>
<td>Net assets</td>
<td>10,633,501</td>
<td>9,191,757</td>
</tr>
<tr>
<td>Total liabilities and net assets</td>
<td>$19,223,545</td>
<td>$17,322,768</td>
</tr>
</tbody>
</table>

**Statements of Activities • Years Ended June 30, 2016 and June 30, 2015**

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and grants</td>
<td>$14,789,398</td>
<td>$15,716,709</td>
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<tr>
<td>Other revenues</td>
<td>2,198,070</td>
<td>563,323</td>
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<tr>
<td>Gross revenues</td>
<td>16,987,468</td>
<td>16,280,032</td>
</tr>
<tr>
<td>Program costs</td>
<td>12,698,050</td>
<td>13,552,444</td>
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<tr>
<td>Fundraising costs</td>
<td>1,555,902</td>
<td>1,584,371</td>
</tr>
<tr>
<td>Management and general costs</td>
<td>1,202,701</td>
<td>1,195,496</td>
</tr>
<tr>
<td>Total expenses</td>
<td>15,456,653</td>
<td>16,332,311</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>1,530,815</td>
<td>(52,279)</td>
</tr>
<tr>
<td>Net unrealized gains</td>
<td>(99,071)</td>
<td>(25,025)</td>
</tr>
<tr>
<td>Net assets, beginning of year</td>
<td>9,191,757</td>
<td>9,269,061</td>
</tr>
<tr>
<td>Net assets, end of year</td>
<td>$10,633,501</td>
<td>$9,191,757</td>
</tr>
</tbody>
</table>

*The financial information presented has been derived from United Way of Palm Beach County’s audited financial statements. 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. United Way of Palm Beach County is an approved Federation representing partner agencies in the Combined Federal Campaign. The partner agencies participating in the Combined Federal Campaign have not been charged dues and/or service charges as a requirement for participation in the Combined Federal Campaign.
Exceptional Individuals Changing Lives and Transforming Communities

Tocqueville Society Members

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

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

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

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

SOCIETY MEMBERS
$10,000 - $14,999
- Anonymous
- Mr. Miguel Arechabala
- Mr. and Mrs. Ronald G. Assaf
- Mr. and Mrs. Eugene Bolton
- Mr. Larry E. Brown
- Mrs. Fabiola Brumley
- Mr. Dan Cane
- Mr. and Mrs. Alexander R. Castaldi
- Ms. Trudy Crowetz
- William and Mary Donnell
- Mr. and Mrs. Frank P. Doyle
- Mr. Alexander W. Dreyfoos, Jr.
- Mr. Michael T. Dunn
- Ray and Nancy Faloono
- Mr. Alfonso “Alfy” Fanjul
- Mr. Jose “Pepe” Fanjul
- Mr. and Mrs. Sidney Forbes
- Mr. Sam A. Forrest
- Mr. and Mrs. David G. Frey
- Dr. Laurie J. George
- Mr. Cary Ginter
- Mr. and Mrs. Leonard Gray
- Mr. and Mrs. Jeff Greene
- Kenneth L. and Summer J. Groves
- Mrs. Martha B. Hartfiel
- Mr. Stephen J. Klingel
- Mr. and Mrs. Howard L. Lance
- Dr. Rene Lerner
- Mr. Bob Levinson
- Mr. and Mrs. Jon R. Levinson
- Mr. and Mrs. H. Irwin Levy
- Mr. Mark Maisto
- Mr. John Marasco
- Mr. Arthur Menor
- Mr. and Mrs. Jack Nicklaus
- Ms. Heather Nisbeth
- Mr. and Mrs. James E. Perella
- Ms. Christine Petranchuk
- Nancy and Steve Schwartz
- Mr. Greg Seelagy
- Mr. Eric Silagy
- Mr. Lawrence Silverstein
- Mr. Jeffrey Sopshin
- Mr. William Striebe
- Mr. Thomas Vining
- Mr. and Mrs. Roger Walcott
- Mr. Peter Wellman
- Mr. and Mrs. Del Williamson
- Mr. William L. Yeager

*Deceased

As of June 2017

With a minimum investment of $10,000 annually, Tocqueville Society members are philanthropic leaders who believe being surrounded by like-minded investors is the best way to collectively tackle some of Palm Beach County’s biggest issues.

“America has a long and rich tradition of generosity that began with the simple acts of neighbor helping neighbor.”
- Alexis de Tocqueville

Benefits of Tocqueville Society Membership

- Exclusive monthly “Tocqueville Tuesday” luncheons (in season) featuring community leaders and perspectives from CEO
- Recognition in The Palm Beach Post and Tocqueville Society member list
- “Tocqueville Impact” newsletter highlighting the Tocqueville Society and the impact your gift has on our community
- Exclusive and customizable volunteer opportunities on request
- Quarterly “Dine United” agency tour followed by lunch