

# Thousands of people gave to the United Way of Charlotte County last year...

## Here's why...

**68,000** people in Charlotte County are living on the edge of financial disaster every day.

Only **57%** of our third graders are reading at grade level.

Over **14,000** Charlotte County individuals sought out food pantry services in the last 12 months and over **436** children in our school system were identified as homeless.

Only **69.7%** of Charlotte County residents identify themselves as healthy and **23,521** remain uninsured.



Serving Charlotte County Since 1966



# It's time for a reality check...

In the age of the Internet, a lot gets passed off as fact.  
We're not immune, so here's the real story.

## MYTH

Donations don't stay here.

## REALITY

99% of the donations we collect stay right here to address the needs of Charlotte County residents - just 1% goes to United Way Worldwide.

## MYTH

A large portion of donations are used for overhead.

## REALITY

Our current overhead rate is 8.25%, down from 9.7% last year and 12% the year before. We have only three full time staff: an Executive Director, a Resource Development Manager and a Finance Manager. A part time administrative assistant and 5 office volunteers support the team. These low overhead rates are in large part thanks to a total of 339 hard-working volunteers who last year donated time valued at \$125,132.

2013 - 2014	2014 - 2015	2015 - 2016
12%	9.7%	8.25%

## MYTH

All the United Way of Charlotte County does is collect money and pass it out to other non-profit agencies.

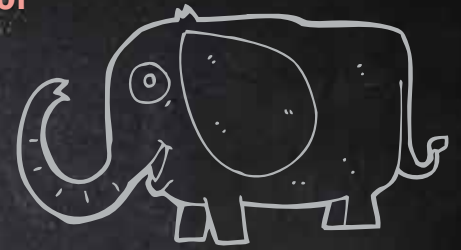
## REALITY

We are your community solutions provider! This year we are funding 26 programs through 19 partner agencies, but this is just a smidgen of the work we are excited about doing. To learn more about all we accomplish, keep reading!

# Now let's address the elephant in the room...

**“I recognize the logo, but don't know what the United Way of Charlotte County (UWCC) does.”**

Our mission is to lead the united effort to eliminate poverty by investing in our community. Everything we do is through the lens of poverty and this mission. We focus on the cornerstones of a good life: education, financial stability and wellness.



**“Why give to UWCC instead of a specific agency?”**

It's ok to give to your charity of choice. Amazing nonprofits in Charlotte County work very hard at their particular mission. Here's why we think a gift to UWCC is the best option. It's like the difference between a single horse pulling the carriage versus a team of horses working together. They get there faster. We leverage the collective power of the experts working together doing what they do best to solve the complex problem of poverty.

	Give to one single agency	Give to UWCC	No single agency can meet all the needs of a family. Our community impact fund invests in the whole person from prenatal care through the life cycle.
Mentoring		✓	
Shelter for homeless		✓	
Financial Assistance	✓	✓	
After school care		✓	
Caregiver support		✓	
Prescription Medication		✓	

**“What's in it for me?”**

It's not just about being a good person, it's about investing wisely. For example: it costs us tens of thousands of dollars per person to react once a person is homeless. You're paying one way or another. Keeping people in their homes costs the community less. It puts people back on their feet where they in turn can contribute to the community.

Let's look at the numbers...

- The cost of leaving a homeless person on the streets : \$31,065**  
**The cost of providing housing: \$10,051**  
 Central Florida Commission on Homelessness 2014
- The cost of housing a prisoner: \$20,553**  
**The cost of educating a child \$8,372**  
 US Census Data/The Verg Institute of Justice
- 47% of Americans cannot cover a \$400 emergency**  
 The Atlantic Magazine, May 2016
- Florida ranked 50th in affordable housing**  
 2015 State Year Report

# Mission = To Eliminate Poverty

Here's how the community impact process works....

Start here



For the greatest return on your investment donate to the Community Impact Fund that supports our bold goals!

# OUR BOLD GOALS FOR CHARLOTTE COUNTY

## Financial Stability

### Issue:

**We know** that over 68,000 people in Charlotte County are living on the edge of financial disaster every day. Until we address the root causes of poverty, we will continue to be stuck in a vicious cycle.

### Goal:

We envision a community where financial stability is available for everyone.

### Strategy:

- Fund and advocate for structured education and training on creating pathways out of poverty to clients, providers, schools and community stakeholders
- Grow and improve free tax assistance services through **VITA**
- Champion and administer **Season of Sharing** program, in partnership with the Community Foundation of Sarasota County

47% of Americans cannot handle a \$400 emergency.

## Education

### Issue:

**We know** that all young people can succeed in school and graduate from high school prepared for college or work. In 2016, only 57% of third graders in Charlotte County are reading on grade level and our current high school graduation rate is 75.5%.

### Goal:

We envision a community where at least 70% of Charlotte County 3rd grade students are reading at grade level or beyond by June 2022.

### Strategy:

- Invest in early childhood programs which ensure kindergarten readiness
- Encourage and fund collaborative efforts with local schools, non-profits and volunteers
- Work closely with Charlotte County Public Schools to identify and support effective programs on a community level

Students who aren't reading at grade level by the end of 3rd grade are four times more likely to drop out of school.

## Health and Wellness

### Issue:

**We know** that when a family is unable to meet their basic needs, or is in an unstable situation, it not only affects their financial standing, but it also affects their physical and mental health.

### Goal:

We envision a community where ALL children, adults and senior citizens have access to services that improve their well-being, and therefore the overall health of Charlotte County.

### Strategy:

- Convene and fund a county wide health and human services strategic plan called **Together Charlotte**
- Monitor and report on the changing needs of Charlotte County residents with regard to food insecurity, domestic violence, access to healthcare, obesity rates, suicide rates and other barriers to wellness
- Support and advocate for basic needs programs that provide immediate relief for a healthier population

23,521 Charlotte County residents lack health insurance.

But wait there's more...

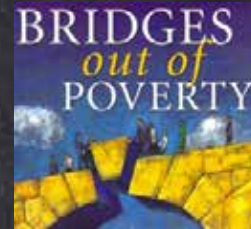
Forging partnerships. Mobilizing resources. New solutions to old problems.

### BRIDGES OUT OF POVERTY



sponsored by  
When you're talking poverty that means using a shared vocabulary when it's time for important discussions. With our partner – Charlotte County Homeless Coalition – we are providing the needed shared language via this nationally recognized program with some pretty impressive results. Bridges Out of Poverty will help:

- Move folks from poverty to self-sufficiency
- Reduce costs related to crime, poor health and welfare
- Strengthen education and job skills
- Revitalize neighborhoods
- Enhance economic development
- Build a sustainable community where everyone can live well



### TOGETHER CHARLOTTE



The United Way of Charlotte County, Charlotte County Human Services and Charlotte Community Foundation in partnership with Charlotte Behavioral Health Center and Charlotte County Health Department are creating a health and human services roadmap to be completed and shared in Charlotte County in early 2017. Improved services are on the horizon as a new strategic plan reduces duplication of services and guides efforts countywide.

### SEASON OF SHARING

Did you know that we are the only fiscal agent in Charlotte County that manages this grant provided by the Sarasota Community Foundation? These funds provide emergency help to folks struggling to make ends meet. Last year we served more than 500 families – two-thirds with kids younger than 18 – keeping many of them from becoming homeless.



### VITA



VITA is short for Volunteer Income Tax Assistance, and that means we provide free tax preparation for those who need it! Last tax season amazing volunteers took intense training prior to preparing 198 returns. But you know what else? We saved the clients \$68,000 in preparation fees. These folks received \$167,000 in refunds and \$74,000 in earned income credit. The average household income was \$21,500 and average age of client was 58.

# Consolidated Statement of Financial Position as of March 31, 2016

<b>ASSETS</b>	<b>2016</b>	<b>2015</b>
<b>Current Assets</b>		
Cash and cash equivalents	\$ 394,924	\$ 352,707
Pledges receivable-net allowance for uncollectible pledges	286,365	285,050
Prepaid insurance	1,523	1,525
Endowment fund investments	345,056	352,490
<b>Total Current Assets</b>	<b>1,027,868</b>	<b>991,772</b>
<b>Noncurrent Assets</b>		
Property and equipment-net of accumulated depreciation	546,832	560,903
Total Noncurrent Assets	546,832	560,903
<b>Total Assets</b>	<b>\$1,574,700</b>	<b>\$1,552,675</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current Liabilities</b>		
Accounts and taxes payable	\$ 13,446	\$ 8,894
Accrued agency allocations	234,135	275,173
Grants payable	296,094	295,653
Security deposits	1,000	-0-
Current maturities of long-term debt	22,940	20,166
<b>Total Current Liabilities</b>	<b>567,615</b>	<b>599,886</b>
<b>Long Term Liabilities</b>		
Long-term debt – net of current maturities	362,842	388,215
Total Long Term Liabilities	362,842	388,215
<b>Total Liabilities</b>	<b>930,457</b>	<b>988,101</b>
<b>Net Assets</b>		
Unrestricted assets	632,724	545,751
Temporarily restricted	11,519	18,823
<b>Total Net Assets</b>	<b>644,243</b>	<b>564,574</b>
<b>Total Liabilities and Net Assets</b>	<b>\$1,574,700</b>	<b>\$1,552,675</b>



#### Executive Committee

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**Sue Sifrit**, Past President

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**W. Kevin Russell & Ashley Maher**,  
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**Roger Eaton**, Community Impact Chair

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SO, ARE  
you in?...

We need you at the table with the other individuals, organizations and businesses who know, like and trust us.

### 3 reasons to give now!



1. Together we can accomplish more than any individual or organization can alone.



2. We are the only ones looking at the human service needs in Charlotte County across the life span from birth to death.



3. We can improve thousands of lives and create long-lasting change that builds more opportunity for all.

### 3 ways to give now!

1. Mail your donation in enclosed envelope
2. Visit [www.areyouin.today](http://www.areyouin.today)
3. Call 941-627-3539

Thank you to our sponsors who invest with us to eliminate poverty in Charlotte County.



Fawcett Memorial Hospital

