

# ANNUAL REPORT

2019-2020

*Transforming  
Local Lives*



# A Letter From

# The Executive Director



Last year began with intention as we developed and released a three-year strategic plan - the map by which all our steps are made. The UWCC Board of Directors re-stated our mission to include the word '**mobilize**'. The community did just that when we launched our inaugural annual campaign cabinet, just one of the steps in adopting a Modern United Way approach.

There are many successes to celebrate and may this report offer you a glimpse. But just as our annual campaign year was concluding in March, the world turned upside down. Subsequently, our county, our state and our nation are still reeling from COVID-19. The effects on our families will be felt for literally generations. As we move into the coming days, we must use our past accomplishments to guide our actions as we double down— we can't stop working, mobilizing. In order for your United Way to be successful, we will focus on engaging our community, creating lasting value and impact while providing exceptional leadership. This is our commitment to Charlotte County.

The bold vision to see fewer families struggling and breaking the cycle of poverty cannot be accomplished without you. Not one person can be left behind, and each day may our passion, intentions and steps be ordered with that one singular focus. For them, we mobilize, we serve, and we invite you to help us.

In service,

A handwritten signature in black ink, appearing to read "Amy Mathews".





# Who We Are

*Together, we strategically invest in, partner with, and mobilize local community partners to solve the most complex social issues we face.*

Through the power of philanthropy we are transforming local lives.

A critical component of **Our Way Forward** will be our commitment to the “**Modern United Way Blueprint**” which serves as our road-map and response to living out our mission.

Our staff, board and community stakeholders will use this blueprint for performance improvement and strategic planning.

Key areas of our work include the community investment process utilizing UWCC donor funds and county/city dollars. Subsequently, we provide monitoring & oversight of the programs funded by these dollars.

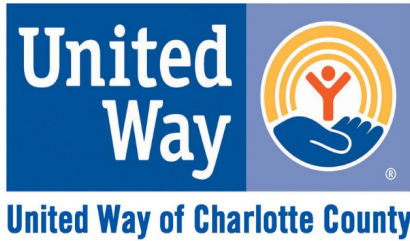


**Mission:** Mobilizing the power of our community to break the cycle of poverty

**Vision:** A community where all citizens achieve their potential through education, financial stability, and healthy lives.



A **Modern United Way** shows up differently in our community by celebrating past achievements, evolving to adapt to the current needs, leaving behind what no longer works, and embracing shared opportunities.



# MODERN UNITED WAY BLUEPRINT

United Way of Charlotte County

Port Charlotte, Punta Gorda & Englewood

## Lead with a Growth Mindset

## Model Diversity, Equity and Inclusion



Best in Class ● Fundraising ● Content  
Digital Experiences ● Volunteer Opportunities

Leverage People,  
Process and Technology

Effectively Learn by  
Using data

Please refer to our 2019-2022 Strategic Plan for a complete list of Community and Agency Goals. The plan can be found at [www.unitedwayccfl.org/strategic-plan](http://www.unitedwayccfl.org/strategic-plan).

# Mobilizing & Engaging

## By The Numbers

**\$1,593,245**  
invested  
in programs

**1,969**  
people across **91**  
presentations  
educated about the  
value of investing  
in UWCC

**77**  
funding panel  
volunteers

**28**  
programs  
provided by  
**21**  
partners

**40**  
Engaged  
Women United  
Members

**4,709**  
volunteer  
hours

**32%**  
increase in social  
media engagement  
across all  
channels

**7K**  
videos views  
promoting 3  
collaborations

**21**  
Day of Caring  
Projects



# What We Do

*Together, our community sets up our children and their parents for success.*

## Priority: Educational Success

**Kids Thrive!** and **Charlotte County Reads** are using an intergenerational approach and a self-sufficiency tool to measure family progress from crisis to thriving which will also be used with other agencies in the future. Literacy is essential for school readiness. Both programs focus on supporting early literacy development within the family.

### Kids Thrive

**Kids Thrive!** works with families of babies born substance exposed to ensure their child has a healthy, thriving early childhood and are ready to succeed at school. **Engaging 87 children and 55 families**, the Collaborative helps families build parenting and family literacy skills.

Through the **Circle of Parents** group, moms learn from each other and build a strong social network. **100%** of babies born to Kids Thrive moms last year did not need the NICU or medication due to their substance withdrawal.\*

The average NICU length of stay for newborns born substance exposed **dropped from 28 to 14 days**, saving \$5,320,100 in hospital costs since its inception.\*\*

*\*Previously all babies were sent to the NICU and treated with medication to manage withdrawal*

*\*\*Based on average cost of daily stay*



**100%**  
of Kids Thrive  
babies born did  
not need the  
NICU

**1,748**  
books collected  
for local  
families

## Charlotte County Reads



**Charlotte County Reads** believes that a solid foundation in reading drives childhood potential to academic success, resulting in overall community enhancement.

Seventy-five struggling readers in Charlotte County were matched with a volunteer mentor and enrolled in an afterschool program that resulted in all 75 youth reading on grade level\*.

Of these youth, **96% actively participated** in the Suncoast Summer Reading Challenge. Combined they read nearly 500 books and academic testing showed they avoided "summer slide".

The UWCC serves as the **lead agency** in Charlotte County for the **Suncoast Campaign for Grade-Level Reading**, recently recognized as National Pacesetters for Mobilizing Success and Deploying Innovative Strategies and Tools.

When COVID-19 hit the community, UWCC convened the **COAD Youth and Education Task Force** to ensure families with a demonstrated need received resources and supplies so that education would remain a priority amid the chaos.

**UWCC and its COAD partners coordinated donation of school and crafting supplies, laptops and encourage summer reading program initiatives.**

*\*Based on results assessed prior to COVID-19*

*"The COAD Youth and Education Task Force has helped connect us in real-time with community partners - so that we can reinforce each other's work and help fill in gaps that emerge. It has definitely helped us be able to be very responsive to the needs that have arisen for those we serve."*

*- Diane Ramseyer, Drug Free Charlotte County*



# WHAT WE DO

## Priority: Financial Security

*Together, our community gives everyone the opportunity to build a better future.*

### Volunteer Income Tax Assistance (VITA)

2020 marked our **7th season** of offering free tax preparation for our community. While we were set to have record breaking numbers, COVID-19 cut our program short by four weeks.

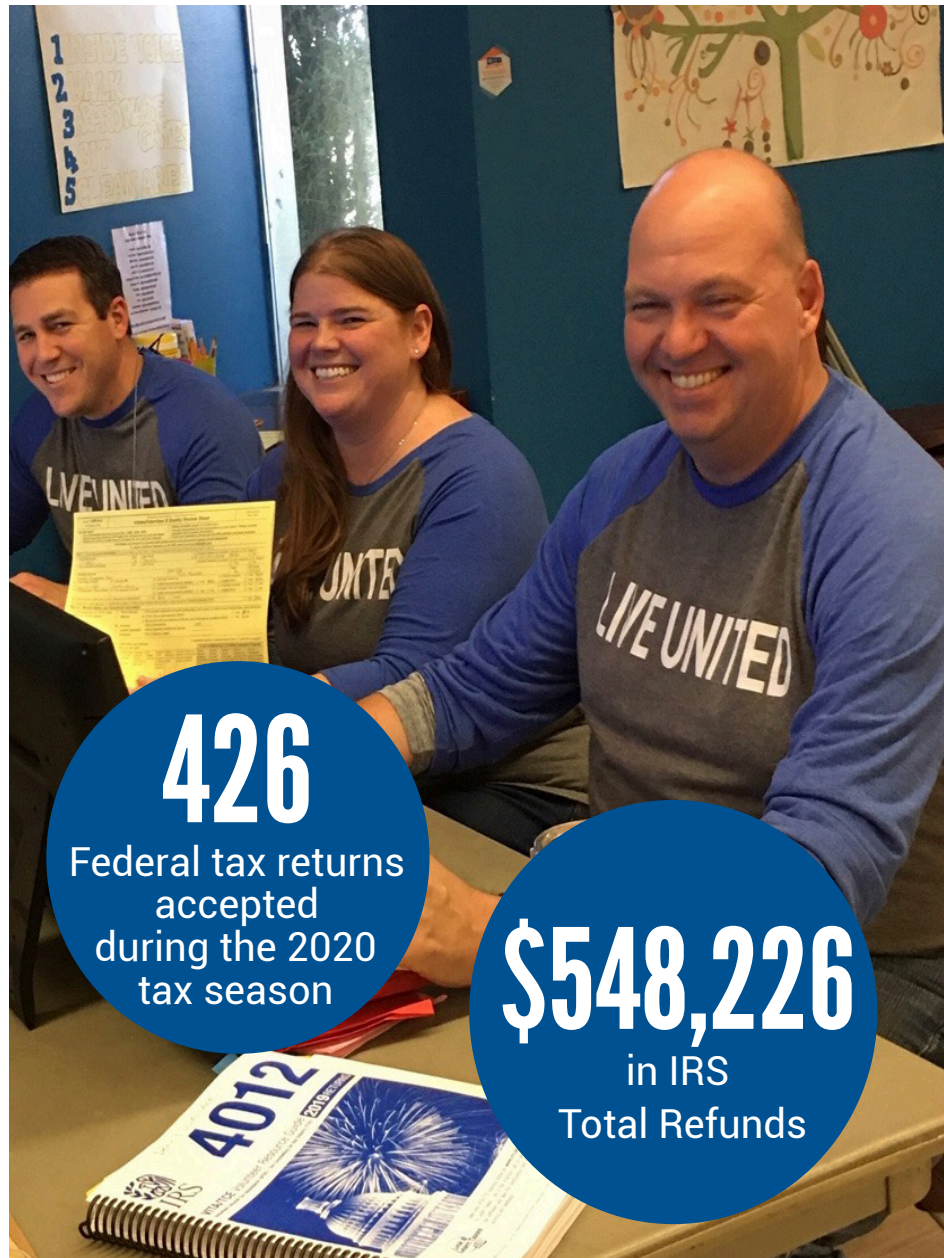
Even with a shorter season, we **increased our Earned Income and Child Tax Credits** by nearly 4% from the previous tax season.

The Adjusted Gross Income for clients served ranged from \$25k to \$29k.

As a result of a survey conducted of Boys & Girls Club families to gauge how UWCC can better support the whole family in reaching financial stability, a **VITA Day** was hosted at the Family Services Center to offer VITA and other relevant local resources.

**Nine ALICE families** received a collective \$31,180 back in tax refunds.

The UWCC team spent time researching and planning next steps to bring our VITA program in-house after seven successful years as a volunteer-run program. UWCC will continue to **mobilize a volunteer team** of IRS-certified income tax preparers annually under internal leadership to grow this program exponentially.



**426**

Federal tax returns accepted during the 2020 tax season

**\$548,226**

in IRS Total Refunds



# Ending Chronic Homelessness

Homelessness should be rare, brief and a one-time experience.

Using a housing first model, and integrated healthcare, along with case management, this collaboration is well on its way towards achieving the Bold Goal of "Ending Chronic Homelessness by the end of 2020".

Over the past three years:

- **84% of clients remained in housing** past the end of receiving financial assistance, compared to national retention rate of 75%
- **78%** average insurance **approval rate** for previously uninsured - compared to the national rate of 63%
- **84 days** to approval for initial insurance applications compared to the national average 108 days\*
- **153 patients** provided life saving clinic and pharmacy services

**NOW**, this incredible team will tackle youth homelessness!

*\* 2019 National Approval Rate on Initial SOAR Applications*

**118**  
chronically homeless  
individuals  
housed over  
the past 3 years

**292**  
families received  
\$247,960 of Season  
of Sharing to assist  
with rent, mortgage  
& utilities

## Season of Sharing

UWCC serves as the Charlotte County **fiscal agent** for **Season of Sharing** for over 20 years. **100%** of these funds go to ensure struggling families stay in their homes.

UWCC donors support our continued contribution to this very important help.

Since March 2020, UWCC has administered an additional **\$278,131 in SOS COVID-19 relief funds** to help families weather this storm.

*"I am honored to serve on the COAD Youth Task Force alongside so many other selfless leaders and organizations in Charlotte County. Each call has been a spring into action to help those who needed us most, and the immense change and impact we have been able to create has been inspiring!"*

*- Jessica Stanfield, Guardian ad Litem Foundation*

# WHAT WE DO

*Together, we're giving our community the opportunity to be resilient and healthy.*

## Priority: Health and Well-being

### Community Collaboration



The **4th Annual Women United Luncheon** provided over 110 guests an opportunity to hear from a panel of experts about how Kids Thrive! is impacting lives and **reducing toxic stress** for families.

Women United embraced Kids Thrive! moms as their platform for the year, under the motto: **Empowering mothers to raise healthy children.**

Through the year, **Women United members volunteered** at schools, **donated** new teacher supplies, **made** welcome bags for Kids Thrive moms and donated diapers, wipes and masks for COVID-19 relief. UWCC was instrumental in connecting families to food as the lead for the Community Organizations Active in Disaster (COAD) Youth & Education Task Force during COVID-19.

Through the COAD partners, over **157,744 meals** and over **200 boxes of organic produce** from Worden Farm were distributed to individuals and families in need during the early months of COVID-19.

UWCC developed and provided informational material for families who received meals, including distributing 300 resource and activity bags.

*"The network of resources we were able to access through COAD helped us stay afloat during a time we were sure we would sink. We were able to secure resources, food, and support when we needed it the most.*

*Thank you, Charlotte County, for caring about your residents during this terrible time!"*

*– foster parent*



# 2020 Charlotte County Community Health and Needs Assessment

UWCC partnered with the Florida Department of Health in Charlotte County, Health Planning Council of Southwest Florida, Charlotte County Human Services, and Charlotte Behavioral Health Care to **develop a comprehensive Community Health & Needs Assessment for Charlotte County.**

UWCC educated stakeholders on the **high rate of child abuse in Charlotte County** (3rd highest in the State for ages 5-11) as well as other key factors that increase toxic stress in a child's life.

Stakeholders were urged to **prioritize the needs of our youngest residents** in the 2021-2026 Community Health Improvement Plan.

The community prioritized the well-being of our children and the reduction of situations that lead to toxic stress and Adverse Childhood Experiences.

Child Abuse, Neglect, and Well-being prioritized as the **#1** health issue to address

Over **200** boxes of organic produce from Worden Farm were distributed to high risk individuals



# WHO WE SERVE

## Meet ALICE

### Asset Limited Income Constrained Employed

*Charlotte County reduced the number of households that fall under the ALICE threshold from 36,700 (2016) to 29,964 (2018).*

With no safety net for emergencies. **ALICE's** income falls short of basic necessities.

In 2018, 29,964 Charlotte County households (40%) were unable to afford even the most basic budget. However, 30% (22,381 households) earned just over the Federal Poverty Level, making them **ineligible for assistance**.

ALICE works in jobs that are vital to keeping Florida's economy running smoothly, but they do not provide adequate wages to cover the basics of housing, child care, food, transportation, health care, and technology.

## Chasing the American Dream

### FINANCIALLY STABLE

- Consistently employed with an income that meets basic monthly expenses, plus the ability to save
- No government assistance needed

### ALICE

- Consistently employed with an income that does not meet basic monthly expenses
- Limited or no government assistance available

### POVERTY

- Inconsistently employed, unable to meet basic monthly expenses
- Often receiving government assistance to meet needs

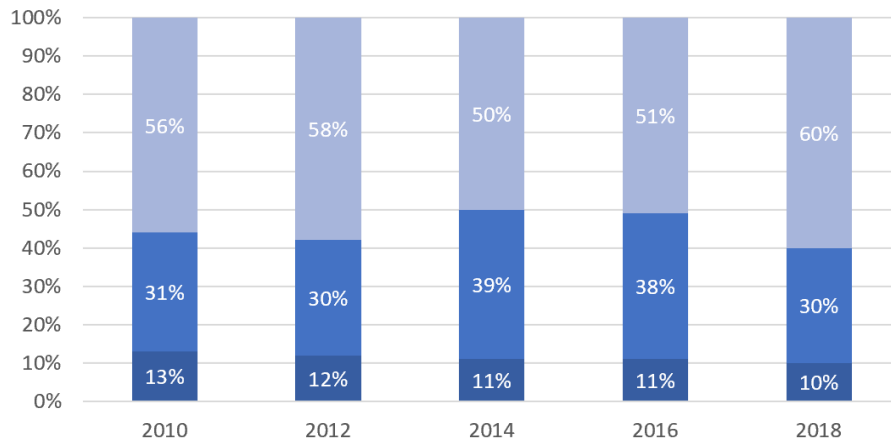


United Way of Charlotte County is grateful for the progress our community has made in the fight against poverty in recent years. However, **our fight isn't over**.

*“Many of us see ALICE everyday, we have placed names with faces, and enjoy talking with them and helping out whenever we can. They are always pleasant, surprisingly upbeat, and hopeful for the future. That’s all changed with COVID.”*  
- Bill Wood, UWCC Board Member and Donor



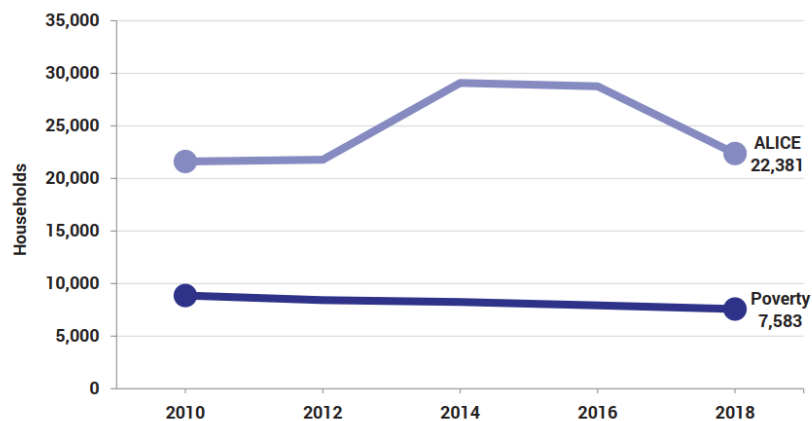
## Household by Income, Charlotte County 2010-2018



*"I thought I should try to get to know ALICE a little bit better. It turns out that thinking about ALICE as just a set of statistics—a number—misses the real ALICE that's hidden away."*

*- Fred Cort, UWCC President Elect*

## Household by Income, Charlotte County 2010-2018



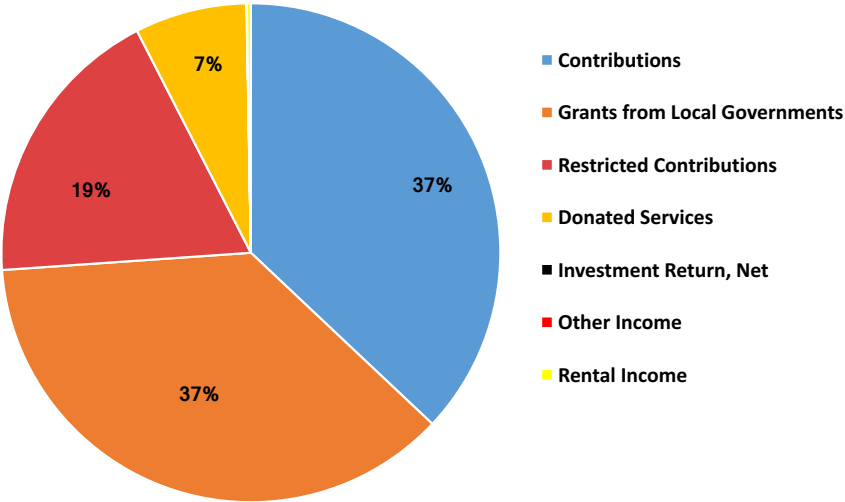
Total Households	2010	2012	2014	2016	2018
	69,176	71,811	75,234	75,147	74,975

Sources: ALICE Threshold, 2010-2018; American Community Survey, 2010-2018

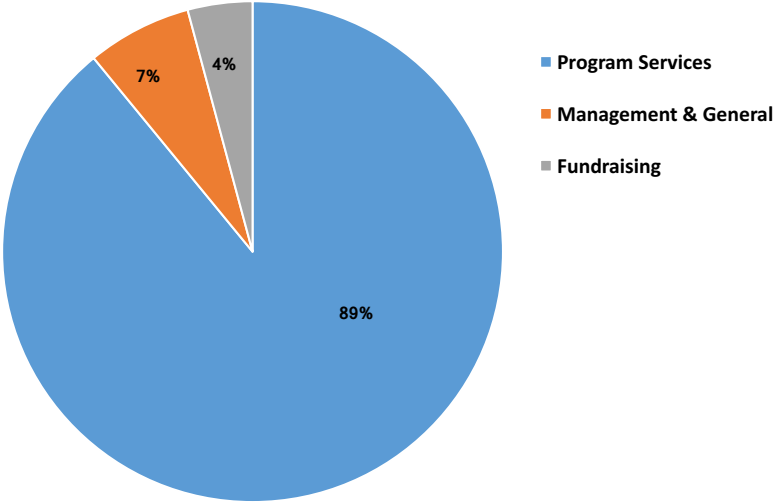
*\*It is important to note that the figures for the 2020 ALICE Report use a slightly revised methodology and are not able to be directly compared to previous ALICE figures. This improved methodology includes a more localized reflection of household costs, a better reflection of household compositions, and a more realistic reflection of the survival budget of those age 65 and over (e.g. lower transportation costs, but higher costs for treatment of chronic conditions).*

# Financial Report

Revenue	
Contributions	\$ 680,627
Grants from Local Governments	\$ 677,500
Restricted Contributions	\$ 341,055
Donated Services	\$ 133,492
Investment Return, Net	\$ 396
Other Income	\$ 10
Rental Income	\$ 4,775
<b>Total</b>	<b>\$ 1,837,855</b>



Expenses	
Program Services	\$ 1,593,245
Management & General	\$ 120,976
Fundraising	\$ 74,709
<b>Total</b>	<b>\$ 1,788,930</b>



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Thank you to the UWCC Inagural Campaign Cabinet





# 2020-2021 Board of Directors

## EXECUTIVE COMMITTEE

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Charlotte Miller,  
Florida Power & Light

### President Elect

Fred Cort,  
Retired Management Consultant

### Past President

Harvey Goldberg,  
Former Mayor City of Punta Gorda

### Treasurer

Steve Curasco,  
Peace River Distributing

### Community Impact

Kristin Cardona,  
Life Care Center of Punta Gorda

### Community Impact / VITA

Marcia M. Cullinan,  
Realtor®, Michael Saunders & Co.

### Resource Development Chair

Erin Gant,  
Riverside Realty

### Foundation Board

W. Kevin Russell,  
P.A., Attorney at Law

## BOARD MEMBER EMERITUS\*

**Debbie Fitzgerald**, SunTrust/Truist

**Thomas Rice**, Retired

**Kathy Silverberg**, Retired

**Sue Sifrit**, Past President,  
Retired Charlotte County School Board

**Leah Valenti**, Southwest Florida District Director,  
U.S. Senator Rick Scott

**Steve Vito**, GWU Unlimited

*\*Denotes a non-voting board member*

## BOARD MEMBERS AT LARGE

**Joe Bender**, DMD,  
Panther Hollow Dental Lodge

**Roger Eaton**,  
Charlotte County Clerk of the Court

**Vanessa Grant Oliver**,  
Ambitrans Medical Transport

**Caryn Huff-Sufferling**, Wharton-Smith, Inc.

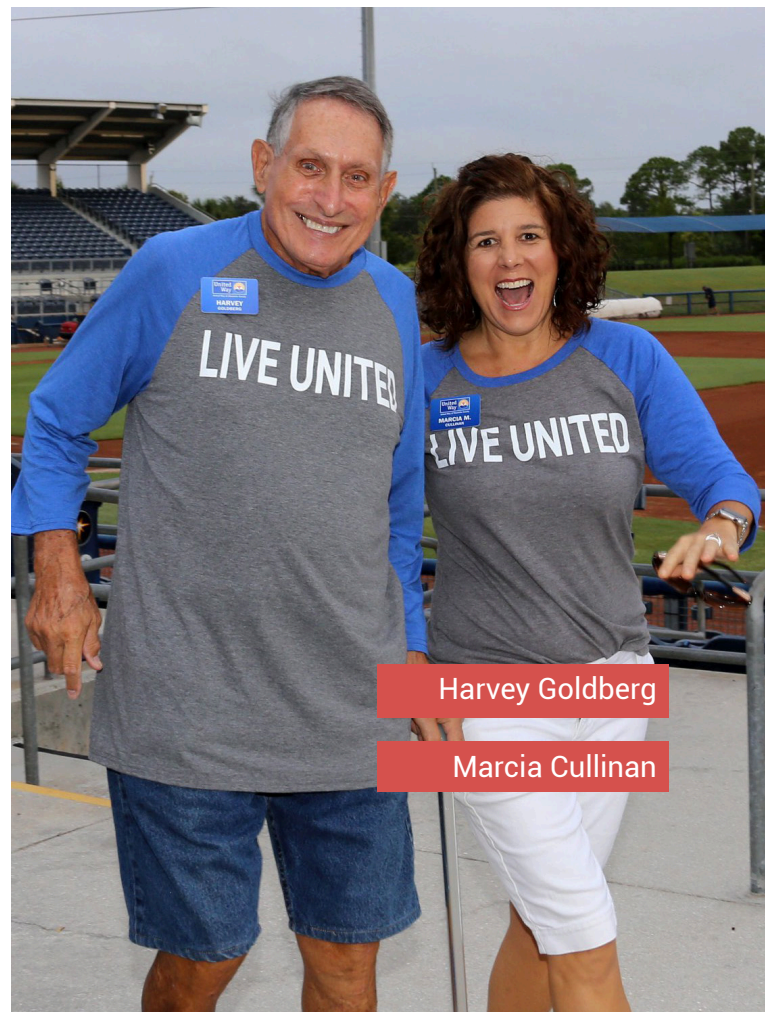
**Cara Reynolds**, Charlotte County School  
Board & WrightWay Emergency Services

**Katie Wallace**, Wallace Law Firm

**Patrice Weston**, Patrice Weston State Farm  
Insurance Agency

**Phil Wickstrom**, City of Punta Gorda

**Bill Wood**, MD, Retired Radiologist



Harvey Goldberg

Marcia Cullinan



# Transforming Local Lives



*"As the effects of COVID-19 continue to unfold, UWCC will stay focused on assisting the most vulnerable in our community."*

*- Charlotte Miller, FPL,  
United Way of Charlotte County Board President*

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