



United Way  
of Charlotte County

## Annual Report 2013



**LIVE UNITED®**

**OFFICERS**

W. Kevin Russell, Esq.  
*President*

Sue Sifrit  
*Community Impact Chair*

Julie Mathis  
*Resource Development Chair*

Kathy Silverberg  
*Secretary*

Maura Matzko  
*Treasurer*

Deborah H. Fitzgerald  
*Assistant Treasurer*

Charlotte Miller  
*Immediate Past President*

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Vikki Carpenter

John Hall

R. Alan Holbach

Howard Kunik

Mark Martella, Esq.

Tom Patton

Chris Porter

Jerry Reed

Linda Rice

Leah Valenti

Doug Whittaker, Ed.D

Carrie Blackwell Hussey  
*Executive Director*

Dear Friends and Supporters,

Forty eight years ago a group of visionary leaders in Charlotte County came together to begin the United Way of Charlotte County, forever changing the way we view collective generosity and building a community together. It has been a historic year for the United Way of Charlotte County. Recognizing the tremendous and changing needs of Charlotte County, we came together with our community partners, service providers, donors and community leaders to complete a Community Needs Assessment.

The community conversations we held, the data we researched, the thousand surveys we received all led us to the completion of the first comprehensive needs assessment in over thirteen years. The information we received is sobering, however, it is necessary to have an accurate picture of our community so we can create a vision of where we need to go... where we want to go.

We know what needs to be done to advance the common good and to create opportunities for a better life for all of us. Every child deserves the chance to learn. Every individual, every family, deserves the opportunity to gain the skills necessary to build a brighter future. The Community Needs Assessment will be our road map, guiding us in the right direction.

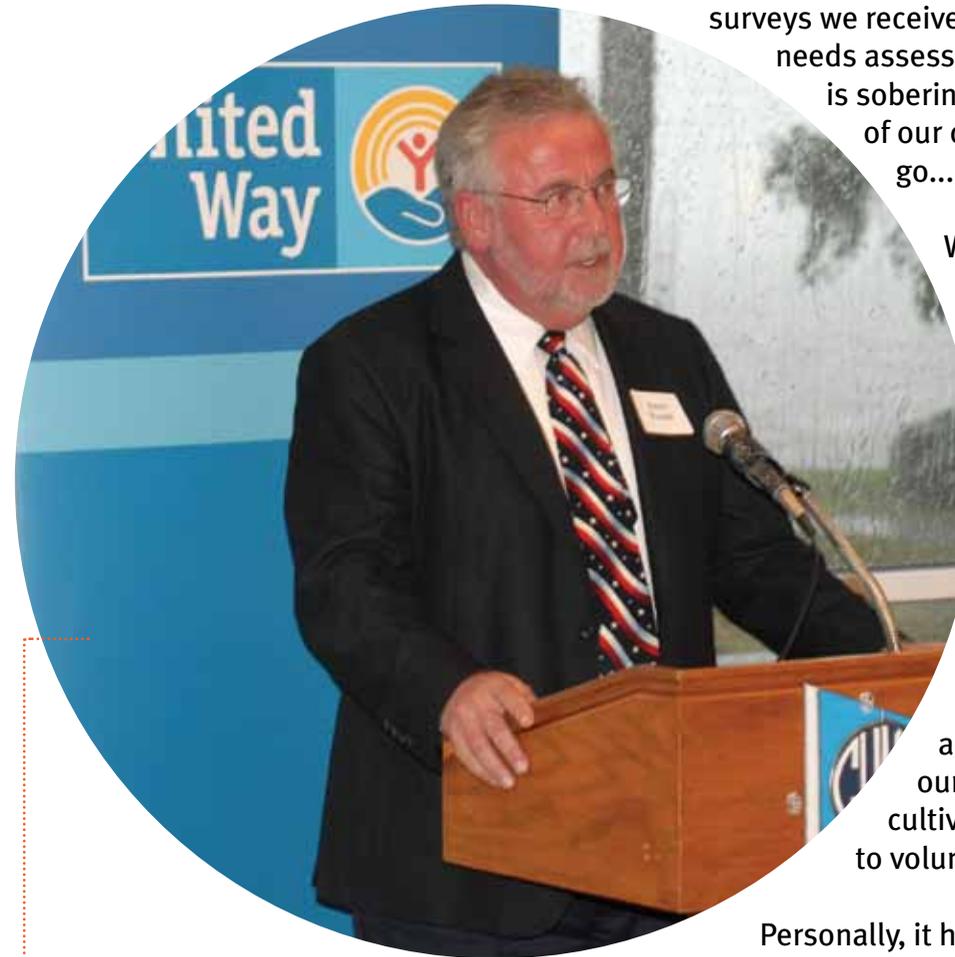
We are deeply grateful to the volunteers and to the donors who contribute to the United Way of Charlotte County. Your continued support and commitment is making a difference in thousands of people's lives. As we look forward, we are poised to make a deep impact in addressing the needs of our community. The leadership of our incoming president, Sue Sifrit, will continue this vision of cultivating social change. Sue's passion and her commitment to volunteerism inspires all of us. We are in great hands.

Personally, it has been a privilege to lead the United Way over the past two years. Thank you for your support. Together we are advancing the common good and taking strategic action to create lasting change in our community.

Warm Regards,



W. Kevin Russell  
President  
United Way of Charlotte County  
Board of Directors



*W. Kevin Russell at the United Way of Charlotte County Annual Meeting held on May 20, 2013.*

## Highlights

### COMMUNITY NEEDS ASSESSMENT

The United Way of Charlotte County, the department of Charlotte County Human Services, and the Charlotte Community Foundation formed a partnership to conduct a community-wide needs assessment. The partnership was established in 2012, after the three agencies noted a striking increase in the demand for health and human services.

The purpose of the needs assessment was threefold:

- ▶ Identify the most significant needs within the Charlotte County communities
- ▶ Identify opportunities based on key findings
- ▶ Address existing gaps in services

It was determined that at this time, in this economic climate, it is crucial that the resources available concern the community's greatest needs, and are dedicated to programs that will have the utmost impact on all our citizens.

The last in depth study on community need had been conducted over a decade ago, and in that time Charlotte County was deeply affected by the hurricanes of 2004, and the worst economic downturn since the Great Depression. Charlotte County saw a significant loss of jobs in the community, and not surprisingly, a significant increase in those living at or below the poverty line.

The findings of the study were sobering. As a result, United Charlotte was formed to bring together key stakeholders to address the greatest needs, assess how to support existing services, and to draw new resources into Charlotte County.

United Charlotte is a growing collaboration of leaders willing to address the needs of our community. Reducing poverty and improving on quality of life for all can, and will happen through uniting people, ideas and resources to advance the common good.

### CHARLOTTE COUNTY COMMUNITY REPORT CARD

Health and Human Service professionals in Charlotte County are committed to having a positive impact on the lives of the citizens they serve. In order to assess the impact, programs and services have on the needs of the community, professionals in Charlotte County examine a variety of indicators. These indicators are both qualitative and quantitative, and will be used to monitor performance, measure achievement and/or reflect change. The Charlotte County Report Card examines the variety of indicators designed to describe community conditions relative to the needs of adults, seniors, children and families of Charlotte County.

## Of The Year

### EMERGENCY FOOD AND SHELTER

Every year resources to address special emergency needs in Charlotte County is distributed through FEMA's Emergency Food and Shelter Program. The Local Emergency Food and Shelter Board is responsible for allocating funds that focuses on economic emergency needs, rather disaster related emergencies. These funds supplement feeding and sheltering efforts. The United Way of Charlotte County is the fiscal agent and provides the administrative oversight for these funds.

### SEASON OF SHARING

Nearly thirteen years ago, the Herald-Tribune Media Group and the Community Foundation of Sarasota County created a fundraising partnership to provide "last resort" funds for individuals or families that are on the verge of homelessness. This year over \$200,000 was distributed to individuals and families in need. The United Way of Charlotte County is the fiscal agent for this effort.

### VOLUNTEER INCOME TAX ASSISTANCE (VITA)

For thousands of households across our county, accessing the right resources during tax season is critical in obtaining a full tax refund. The simple truth is that when taxes are done right, the result could mean valuable tax credits and refunds that go a long way in a family's annual budget.

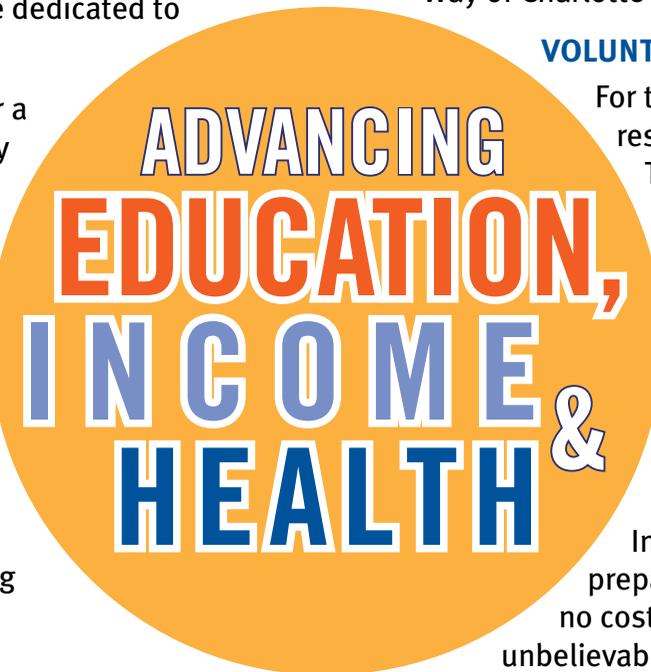
According to the IRS, approximately 20% of residents do not claim one of the biggest boosters to family incomes, because they either do not file their taxes or they are simply unaware of their eligibility. The Earned Income Tax Credit is a refundable tax credit that can amount to as much as \$6,143 per qualifying family.

This year, the United Way of Charlotte County launched a Volunteer Income Tax Assistance program. VITA is an IRS-supported tax preparation service through which trained volunteers prepare taxes at no cost for qualifying individuals and families. This program has had an unbelievable response, and we look forward to reporting all of the details to you on our website. The program was offered in partnership with Goodwill Industries of SWFL and SunTrust Bank.

### POSITIVE AGING SYMPOSIUM

The United Way of Charlotte County co-sponsored the first Positive Aging Symposium along with Edison State College, and the Senior Friendship Centers. The events theme was, "Four Keys to a Healthy & Fulfilling Life after Fifty." The program hosted an informal discussion of experts and seniors on topics of financial health, retirement readiness, health and wellness after 50, and navigating community resources.

The United Way of Charlotte County recognizes the growing needs of our seniors to lead healthy and productive lives. Individuals over the age of 65 represent approximately 36% of the county's population. Charlotte County's senior population ranks 2<sup>nd</sup> in the state, as well as 2<sup>nd</sup> in the nation in size. By 2020, it is expected that Charlotte County's population, age 65 and older will increase by 33.93%.



## Our Partner Agencies

Your contribution to the United Way of Charlotte County supports the 39+ programs at these Partner Agencies who meet high standards of effectiveness and efficiency while delivering lasting and quantifiable results:

### EDUCATION

AMIkids Crossroads  
 Big Brothers/Big Sisters of the Suncoast  
 Boy Scouts, Southwest Florida Council  
 Boys & Girls Club of Charlotte County  
 Charlotte Local Education Foundation  
 Children's Network of Southwest Florida  
 Civil Air Patrol  
 Early Learning Coalition of Florida's Heartland  
 Girl Scouts of Gulfcoast Florida  
 New Operation Cooper Street  
 Voices For Kids  
 Y.M.C.A., Charlotte Family  
 Y.M.C.A., Englewood Family



*Big Brothers Big Sisters of the Suncoast enjoy a Tampa Bay Rays game.*

### RESOURCES

American Red Cross, Southwest Florida Chapter  
 Center For Abuse And Rape Emergencies (C.A.R.E.)  
 Charlotte County Homeless Coalition  
 Florida Center for Early Childhood  
 Goodwill Industries  
 Harry Chapin Food Bank of Southwest Florida

### HEALTH

Alzheimer's Association  
 Charlotte County Healthy Start Coalition  
 Charlotte Hiv/Aids People Support (C.H.A.P.S.)  
 Drug Free Charlotte County  
 Hearing Impaired Persons of Charlotte County  
 Senior Friendship Centers  
 Tidewell Hospice and Palliative Care  
 Time Out Respite Care  
 Virginia B. Andes Volunteer Community Clinic  
 Visually Impaired Persons of Charlotte County



*Every client entering the Charlotte County Homeless Coalition's Shelter is assigned a caseworker. They also assist those struggling to remain in their home.*

## By the Numbers

Thanks to the support we received from our donors, this is a small sample of the difference those donations made last year in Charlotte County:

**3,800** residents received food monthly, and had their hunger needs met.  
 40% are children.

**4,950** high school students received alcohol and marijuana use prevention to prevent or reduce usage.

**6,825** people gained access to needed health care and medication.

**7,897** residents received services to overcome barriers to gainful employment.

**5,840** individuals with disabilities received services to provide stability through education and job training.

**11,376** homeless and sheltered individuals and families received hot and nutritious meals.

**287** homebound seniors received friendly visitors making routine visits offering socialization.



*New Operation Cooper Street offers structured programs and after school activities for neighborhood kids of all ages.*



*Boys & Girls Club members working hard to paint a thank you sign for Publix Appreciation Day.*



*Time Out Respite Care provides qualified caregivers and social programming for the severely disabled.*

## 2012 - 2013 Corporate Partners

A special thank you to the following community-minded businesses for their generous support during our 2012-2013 campaign:

### Top 10 Corporate Partners

- Publix Super Markets
- Mosaic Fertilizer LLC,
- SunTrust Bank Gulf Coast
- Charlotte County Public Schools
- Charlotte County Government
- Florida Power & Light
- The King Logie Foundation, Inc.
- Bank Of America
- Peace River Distributing, Inc.
- Fawcett Memorial Hospital



*Carrie Blackwell Hussey, Executive Director of the United Way of Charlotte County made opening remarks.*



*Julie Mathis presenting Alan Holbach with an award for the Charlotte County Government for excellence in the 2012-2013 Campaign.*



*Stephanie Kissinger from Waste Management and Kaley Miller from Mosaic Fertilizer LLC, accepting awards in appreciation for campaign sponsorship.*

## 2012 - 2013 Corporate Partners



*Don McDonough accepting an award for the top Publix Supermarket Campaign.*



- Macy's
- City Of Punta Gorda
- UPS
- Wal-Mart
- Waste Management
- Suncoast Media Group
- Wells Fargo
- Charlotte State Bank
- Target Stores #690
- AT&T Florida
- Federal Express
- Center for Abuse and Rape (C.A.R.E.)
- Fifth Third Bank
- Fidelity Charitable Gift Fund
- Pfizer Foundation UW Campaign
- Englewood Bank
- Charlotte County Property Appraiser
- Emergency Consultants, Inc.
- Dillard's
- Busey Bank
- Truist
- Nationwide
- JC Penney Company, Inc.
- Lenovo
- Merrill Lynch Wealth Management

*Peace River Distributing receiving awards in appreciation for their outstanding support.*

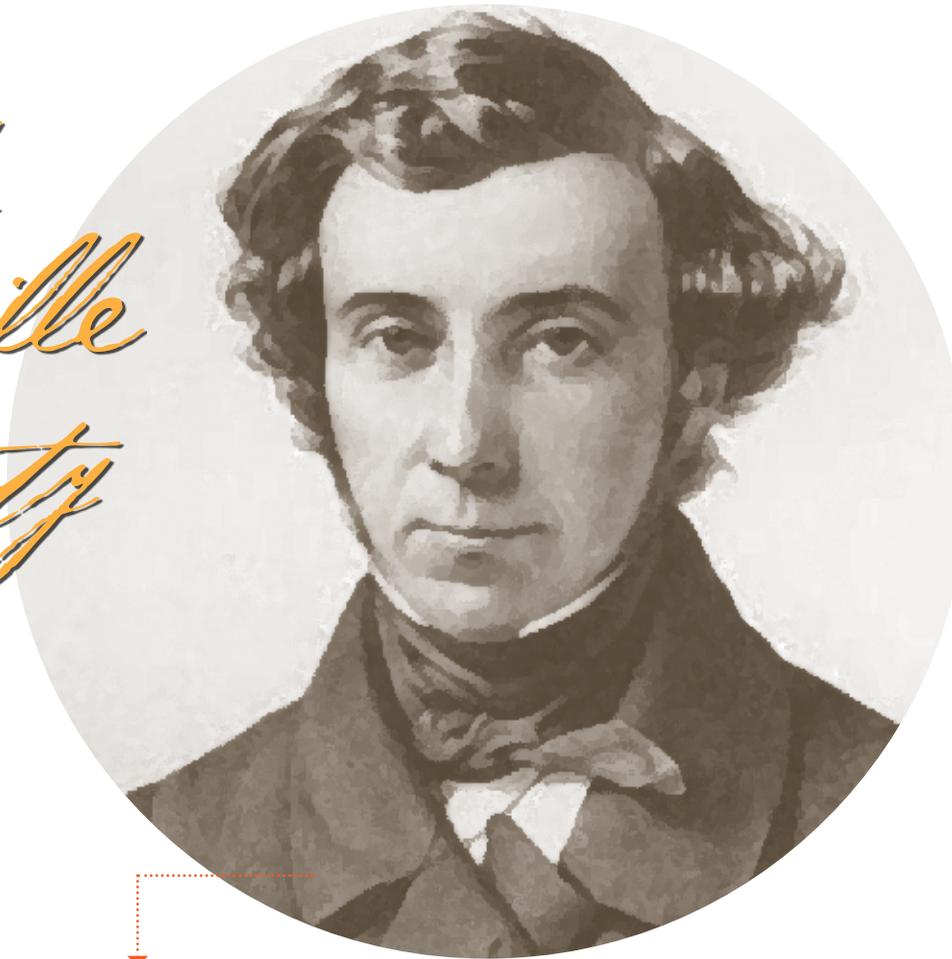
## 2012-2013 Leadership Circle

We sincerely thank each and every one of our contributors. It is through their support that the United Way of Charlotte County is able to provide quality services to our community. Leadership donors extend a very personal and powerful commitment to making a difference in Charlotte County.

### **ALEXIS DE TOCQUEVILLE SOCIETY \$10,000+**

Mark and Linda Formica  
Howard Jenkins

*Alexis de  
Tocqueville  
Society*



*Alexis de Tocqueville*  
(1805 – 1859)

Named for the young Frenchman who in the early 1800's traveled throughout the United States. Alexis de Tocqueville wrote of his admiration for the American spirit, of voluntary effort, and their commitment to philanthropy for the common good. Local members of the Society demonstrate the highest level of individual support for the United Way through their annual contributions of \$10,000 or more.

## 2012-2013 Leadership Circle

### **KEEL CLUB COMMODORE \$2,500 - \$4,999**

Carleton & Almut Haswell  
R. Alan and Bonnie Holbach  
William Pretsch  
Kenneth L. Roberson  
Raymond J. Sandrock  
Jim & Kathy Silverberg  
Dimitrios James and Ann Vellonakis  
Steven J. Vito  
Robert Wenzel

### **KEEL CLUB CAPTAIN \$1,500 - \$2,499**

Shannon Bholaramsingh  
Denis Cain  
Emily Chidester  
Jerome and Peggy Cohen  
Fran Cornwall  
Thomas Dominici  
Christine Dote  
Kristie Frawley  
Robert R. Giordano  
David J. Higginbotham  
Donald C. Hintz  
Jay Roughton  
W. Kevin Russell  
Heather Sanborn  
Robert and Sue Sifrit  
Roger and Linda E. Tetrault  
Chris Wenzel  
Janet E. Wenzel

## 2012-2013 Leadership Circle

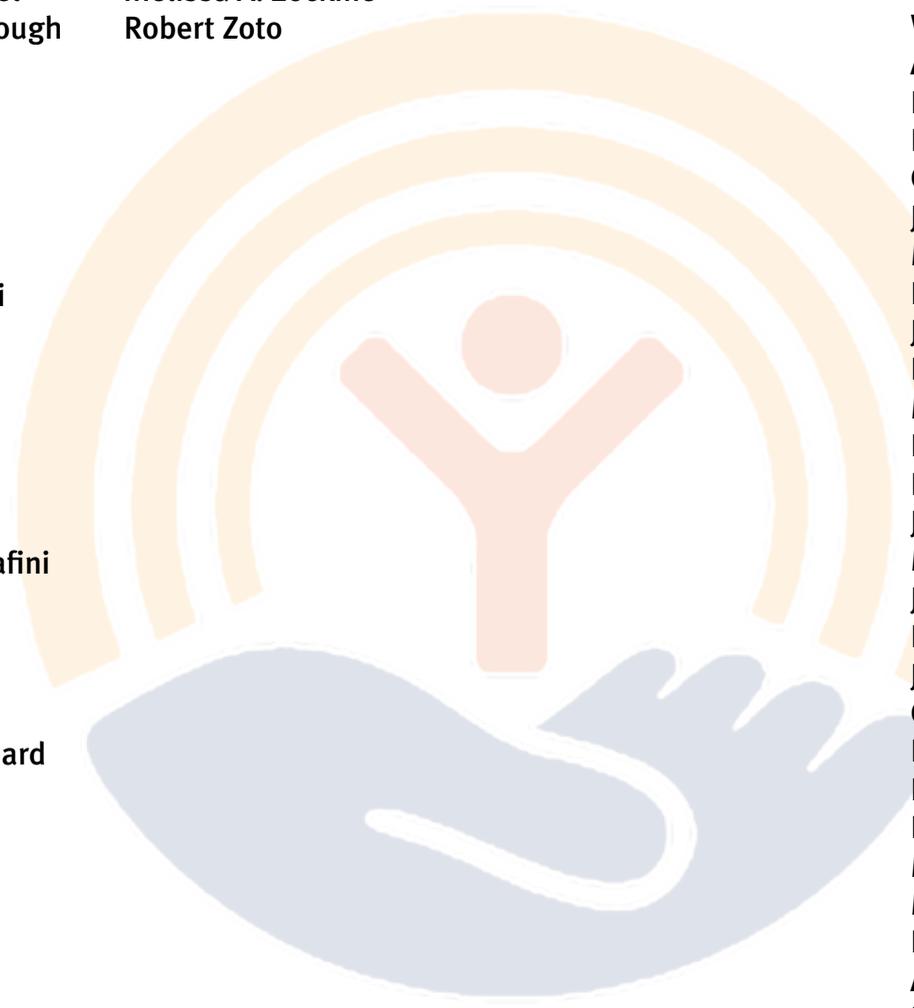
### KEEL CLUB COMMANDER \$1,000 - \$1,499

Douglas Ackley	Kimberly A. Koennemann
Regina R. Anderson	Charles Koons
Todd Baird	Tracy Lanum,
David and Mary Lou Bixler	Sonya Lawman
William & Eleanor Brown	Frank and Jill Leggio
Isola Burns	Doug Lowndes
Kyle Butcher	Jarrett Malanowski
Peter Campo	Ruthanne McDaniel
Ken and Pat Cargill	Donald W. McDonough
Jennifer R. Copeland	Charles McNamee
James Crawshaw	Thomas Millican
Julian Derose	Mark Moss
Fay A. Donaghy	Colleen Norton
Kendale Downing	Eric Norton
Keith Dragon	David Palumbo, Jr.
Sharon Elliott	Jennifer Pennacchi
Robert Fenton Jr.	Mark Porterfield
Deborah Fitzgerald	Bobby Rich
Joseph Foster	Jose Rivera
Bill M. French	Gary Sands Jr.
Joseph Giangreco	Sandra K. Scheel
Joshua D. Goff	Garnette Scholl
Rosalea R. Goff	Joseph & Rita Serafini
Audrey Guy	Jesse Skerkowski
Jessica Hahn	Eleanor Skinner
JoAnn P. Helphenstine	Samantha Smith
Crystal Hess	Matthew Stancil
Carl Hinkle	Christopher Stoddard
Chris R. Holt	Daniel Taulbee
Paul A. Jackomin, Jr.	Brett Tessier
Eric Jacobs	Cynthia Vogel
Bradley Jaros	Autumn L. Voigt

### KEEL CLUB LIEUTENANT \$750 - \$999

June S. Baumhardt	Deborah A. Coppens
Valerie A. Beck	Heather L. Jackson
Garry L. Bingham	Peter Karuba
Catherine Z. Bixenman	Mike L. Laidler
Christine Burke	Donna McCrea
Janet L. Campbell	John Nardini
Victoria Carpenter	Joshua Sweeting

Heide J. Walsh  
Valerie Walsh  
Lorolei J. Wilkins  
Laura L. Williams  
Darrel E. Wilson  
Laurie A. Wilson  
Rachel A. Youmans  
Melissa A. Zockine  
Robert Zoto



## 2012-2013 Leadership Circle

### KEEL CLUB MIDSHIPMAN \$500 - \$749

Steve Adams	Linda Lusk
Jean M. Andreu	Gregory Magac
Robert and Joan Andrews	Samantha R. Markland
Dawn M. Balsizer	Julie C. Mathis
Deborah Bauck	Maura Matzko
Thomas K.Caldwell	Curt and Doris Mayer
Steve Carpio	James and Mary McCullough
Alex Chang	James McLean
Wai Choi	Thomas and Susan McRae
Angela M.Christie	Bernard Milosky
Brian Condrey	Robert Mumford
Kimberly Corbett	Chad P. Noble
Christopher R.Couture	Talmidge Orren
James Cox	Igor B. Osypenko
Melinda Crawford-Richardson	Joseph Paul Payette
Bill and Bobby Cromer	Michael R. Potter
Jeanette Deptula	Kathleen Putch
Brooke E. Dixon	Michael D. Raney
Michael Edlin	Edward Reid
Lorraine H. Fenton	Jonathan Rivera
Debrah Forester	Rick T. Roberts
Joachim Franklin	Linda E. Scott
Mark Gering	Christina M. Sheppard
Jerrine M. Goff	Elena A. Smith
Ronald P. Harrington	Sean Stahursky
Jeffery Hay	Patricia H. Stancil
Cory Hayes	Sandra L. Stites
Evan J. Hollister	Wayne Theiss
Paul A. Jackomin, Sr.	Aron Tobolski
Leighann Jacobs	Paul J. Toma
Michael L. Jones	Gregg Tubbs
Michael M. Kasdan	Hugues Vilatte
Roy & Julie Kern	Eliza M. Viner
Aleksandr Khanin	Jacob C. Wagner
Jacqueline C. Kinney	Lory Weisensee
Kimberly K. Klocke	Gwin & Marjorie Whitney
Howard Kunik	Douglas K. Whittaker
Dennis G. Lambert	Philip Wickstrom
Leonard Lesaltato	Theresa M. Williams
Thomas and Deanna F. Little	Marianne L. Young

*For more information on how to become a leadership donor, or if your name has been omitted, please call 941-627-3539.*

## STATEMENT OF FINANCIAL POSITION For the fiscal years ended March 31, 2013 and 2012

	2013	2012
<b>ASSETS</b>		
<u>Current Assets</u>		
Cash and cash equivalents	\$ 361,387	\$ 409,259
Rent receivable	500	- 0 -
Pledges receivable – net allowance for uncollectible pledges	329,044	343,854
Prepaid expenses	1,529	2,622
Endowment fund investments	383,345	369,346
<b>Total Current Assets</b>	<b>1,075,805</b>	<b>1,125,081</b>
<u>Noncurrent Assets</u>		
Property and equipment – net of accumulated depreciation	599,901	619,266
Deposits	276	276
<b>Total Noncurrent Assets</b>	<b>600,177</b>	<b>619,542</b>
<b>Total Assets</b>	<b>\$1,675,982</b>	<b>\$1,744,623</b>
 <b>LIABILITIES AND NET ASSETS</b>		
<u>Current Liabilities</u>		
Accounts and taxes payable	\$ 7,258	\$ 8,578
Prepaid pledge	- 0 -	85,711
Accrued agency allocations	352,197	365,588
Grants payable	298,277	295,902
Current maturities of long-term debt	17,747	16,609
<b>Total Current Liabilities</b>	<b>675,479</b>	<b>772,388</b>
<u>Long Term Liabilities</u>		
Long-term debt – net of current maturities	426,089	441,754
<b>Total Long Term Liabilities</b>	<b>426,089</b>	<b>441,754</b>
<b>Total Liabilities</b>	<b>1,101,568</b>	<b>1,214,142</b>
<u>Net Assets</u>		
Unrestricted assets	513,874	507,973
Temporarily restricted	60,540	22,508
<b>Total Net Assets</b>	<b>574,414</b>	<b>530,481</b>
<b>Total Liabilities and Net Assets</b>	<b>\$1,675,982</b>	<b>\$1,744,623</b>

Read Independent Auditors' Report  
The accompanying notes are an integral part of this statement.

## WHAT DOES UNITED WAY DO?

United Way is a global network that in the United States advances the common good and creates opportunities focusing on the three key building blocks of education, income and health. United Way of Charlotte County has been serving this community since 1966. The organization engages people, corporations and community agencies that bring the passion, expertise and resources needed to get things done. LIVE UNITED® is a call to action for everyone to become part of the change through giving, advocating or volunteering. **For every dollar raised, .99 cents STAYS in CHARLOTTE COUNTY.**



## HOW DOES THE COMMUNITY GET INVOLVED?

The Community Impact Committee is an excellent example of caring individuals working together to make life better for people in Charlotte County. Approximately 75 volunteers serve on this committee, which is instrumental in determining where United Way funds are best used, and fulfilling the important United Way role of accountability. Local volunteer committee members represent the thousands of donors who give through the United Way.

United Way has now taken a bold leap forward – putting a stake in the ground in order to accelerate change. The Community Needs Assessment completed in 2013 brought critical health and human issues to light. Going forward, the emphasis will be on measuring the investment to ensure the greatest impact. Community involvement is crucial to the vision of the United Way of Charlotte County.

## HUMAN SERVICE GRANTS

The United Way of Charlotte County is the fiscal agent for both the Charlotte County and City of Punta Gorda Human Services grants. The United Way receives no administrative fee to provide these services. In fact, the United Way of Charlotte County does not receive any government funding.

## I WANT MY BUSINESS TO BE INVOLVED WITH UNITED WAY.

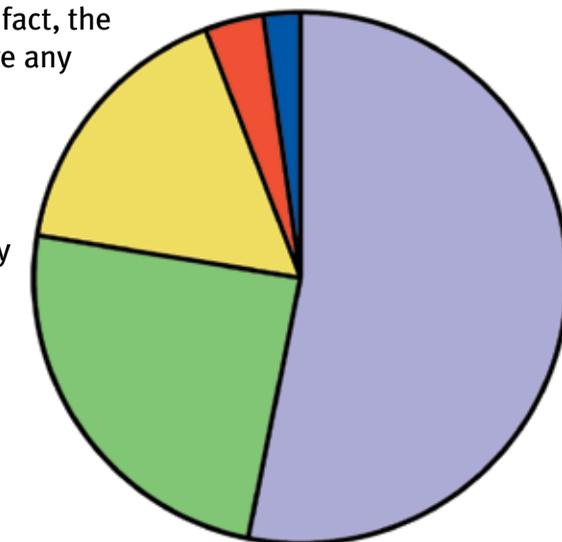
Businesses support the vision of the United Way through leadership, conducting employee supported campaigns, and volunteering for programs like Day of Caring.

For more information about the United Way of Charlotte County, please go to our website at [unitedwayccfl.org](http://unitedwayccfl.org).

## UNITED WAY GRANT BREAKDOWN

Total Allocated: \$1,112,452.76

(Percent of total funding represented in pie chart)



- BOCC Health & Human Services Grant
- United Way Community Impact Grant
- Season of Sharing Grant
- EFSP (Emergency Food & Shelter Grant)
- City of PG Health & Human Services Grant

## Vision

*A community united to create better opportunities for all.*

## Mission

*Uniting people, resources and ideas to advance the common good.*

## Core Values

*In pursuit of its Mission, United Way of Charlotte County will:*

- ▶ *Act with integrity*
- ▶ *Hold ourselves to the highest standards of accountability*
- ▶ *Commit to excellence*
- ▶ *Demonstrate courageous leadership*
- ▶ *Create a culture of service*
- ▶ *Believe in LIVE UNITED*
- ▶ *Embrace Diversity*

→ **This is what it means to**  
**LIVE UNITED**



**United Way  
of Charlotte County**

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941.627.3539  
[www.unitedwayccfl.org](http://www.unitedwayccfl.org)