Great Things Happen When We Live United!

2014–2015 ANNUAL REPORT

United Way of Lake & Sumter Counties
United Way of Lake and Sumter Counties (UWLS) recently embraced a new and powerful Mission focused on improving lives by mobilizing the caring power of our communities. In order to impact lives we must ensure that everyone in a community acts together to change the condition and systems that affect people. We strive for excellence in our day-to-day work by identifying and developing services and programs to enhance our capacity to achieve our community goals.

OUR MISSION

“Improve the quality of life and build a stronger community by leveraging resources and uniting community partners to impact Education, Income, and Health.”

OUR VISION

“United Way of Lake and Sumter Counties envisions a community united to create better opportunities for all.”

Serving our communities is how we LIVE UNITED
Dear Friends,

As leaders in the community, you have helped us move into a new era of shaping United Way of Lake & Sumter Counties and how it impacts our community. We have been able to achieve great things by working together with agencies, government officials, and our local businesses to ensure we have strong educational programs, provide access to quality health and preventative care, and continue to help families reach financial stability.

Some of our accomplishments this year include:

- Reducing food insecurities by investing over $50,000 in our Human Care Network food pantries.
- Increased our awareness of our 211 program as demonstrated through a 60% increase in new calls.
- Distributing 4,500 pajamas and books through our 7th annual PJ & Book Drive in partnership with Silver Trefoil Group of the Girl Scouts Alumnae of the Villages.
- Preparing to launch our Master Teacher Program

The Board and staff of UWLS are passionate and driven to continue to improve the education of our children and support those adults who have a dream of higher education that will move them towards financial stability, for them and their children. We will continue to support and strengthen programs in our community that align with these goals.

We invite you to join us by becoming a volunteer, sending a gift, or simply taking the time to advocate for the changes needed to improve our community. Change can't happen without you. If we all stand together we can create lasting change that will shift the course for future generation. Great things happen when we work together!

Thanks for supporting your United Way. We look forward to many years of successful partnerships and economic progress for our communities.

Sincerely,

Don Lucas
Chairman of the Board
In 2014 UWLS initiated the transition from agency funding to impact strategy, an approach to address the root causes of community problems. Education was identified as the foremost priority funding area. The two target issues were Improving School Readiness to ensure that children entered school ready to learn and read; and Promoting Academic Achievement to assist elementary school students and help them to be prepared to succeed in later grades.

Furthermore, in 2014, all programs and services were aligned with United Way Worldwide Building Blocks for a better life: Education, Income, and Health.

Two programmatic divisions were created:

- Community Investment, to make grants aligned with the Building Block target issues. Prospective grantees had to reapply for Certification of Eligibility and complete a new Application for Program Funding that included Program Outcomes.
- Community Services was established to integrate basic need services in a coordinated and efficient way.

Under the Safety Net Umbrella, four distinct programs were included to assist individuals and families in crisis:

1. The Human Care Network to provide food assistance to the food insecure;
2. The Family Emergency Assistance Program to assist families and individuals in need of housing, prevent utilities shut-offs and assist with transportation needs.
3. A Financial Stability and Resources Strategy included the Volunteer Income Tax Assistance Program (VITA), a University of Florida Budget Management Calendar, and support of community job fairs.
4. The 2-1-1 United Way Information & Referral Services that allows those in need to be referred free of charge to services and agencies that can help them.

EDUCATION
To increase the number of children ready to learn and to provide support to those who are struggling to read in elementary school.

INCOME
To increase access to financial stability resources for low-income families and individuals in order to meet their basic needs.

HEALTH
To increase access to nutrition and health education resources to support opportunities for a healthy lifestyle for all.
REAL CHANGE REQUIRES tackling the source of COMMUNITY challenges

<table>
<thead>
<tr>
<th>EDUCATION</th>
<th>INCOME</th>
<th>HEALTH</th>
<th>GRAND TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>$477,375</td>
<td>$91,375</td>
<td>$364,150</td>
<td><strong>$932,900</strong></td>
</tr>
</tbody>
</table>

Lifestream….Children's Clinical Services
New Vision for Independence….Vision Rehab
Sunrise ARC….Medical Assistance Program
Mid Florida Community Services….Elder Care
Langley Medical Center….Dedicated to Diabetes
Cornerstone Hospice….Un or Underinsured Fund
The Haven….Domestic Violence Services
Lake Technical Center….Ed to Work Initiative
Boy Scouts of Central Florida….Scouting in Lake
SCARC….Life Skills Development
Lake Early Learning Coalition….School Readiness
Education Foundation….Take Stock in Children
ELC Nature Coast….School Readiness
Redlands Christian Migrant Center….School Ready
Impact in Education

$294,200

Education is the cornerstone of individual and community success.

<table>
<thead>
<tr>
<th>COUNTIES</th>
<th>GRANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Programs in Lake County</td>
<td>$165,000</td>
</tr>
<tr>
<td>Education Programs in Sumter County</td>
<td>$129,200</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>$294,200</td>
</tr>
</tbody>
</table>
A child who does not graduate has an effect on everyone. Education is the single most influential factor in ensuring that children grow up to do as well or better than their parents. It also leads to higher incomes, healthier families, lower crime, a stronger workforce and a lifelong sense of self-worth and dignity. But, with a high school student dropping out every 26 seconds nationally and third-grade reading levels being below average, we are facing an impending crisis. This is why United Way of Lake and Sumter Counties provides on-going support to education programs. By removing barriers that directly impede student success (like hunger, homelessness, financial instability, or lack of adult mentoring), UWLS is taking steps to break that cycle. UWLS is removing barriers by investing over half a million dollars in education in the past few years.

Education is the foundation building block for all we do!
EARLY LEARNING PROGRAMS………………………………$62,000

**UWLS Target Issue:** Improving School Readiness  
**Intended Result:** Children enter school ready to learn and to read  
**Goal:** To increase the number of students from low-income families participating in UWLS sponsored programs that are prepared to enter kindergarten.  
**Organizations:**  
- **Early Learning Coalition of Lake County**  
  Programs: The Big Blue Bus and Raising a Reader  
- **Redlands Christian Migrant Association**  
  Programs: Opening Doors---A National Parental Leadership Program

AFTER SCHOOL AND SUMMER READING PROGRAMS..................$121,000

**UWLS Target Issue:** Promote Academic Achievement  
**Intended Result:** Elementary school students are prepared to succeed in later grades.  
**Goal:** To increase the number of students from low-income families participating in UWLS sponsored programs that provide after school academic assistance and prevent summer slide.  
**Organizations:**  
- **Boys & Girls Club of Lake and Sumter Counties**  
  Programs: Project Learn and Project Summer Brain Gain  
- **Boys Scouts of America Central Florida Council**  
  Programs: STEM Cub Scout Day Camp, STEM Co-Ed Camp, and STEM Trailer  
- **Golden Triangle YMCA**  
  Program: Reader’s Theater-After School and Summer Reading Program  
- **The Genesis Center**  
  Program: After School Life Skills Program
EARLY LEARNING, AFTER SCHOOL, ADULT LEARNING..........$129,000

EARLY LEARNING AND AFTER SCHOOL PROGRAMS:
Organization:
Boys and Girls Club of Lake and Sumter Counties
Programs: Project Learn and Summer Brain Gain
Boy Scouts of America Central Florida Council
Programs: After school and summer reading
The Refuge at Jumper Creek
Program: Educational Center for Homeless Children
Sumter County Schools
Program: 3rd grade academic achievement

ADULT EDUCATION PROGRAMS:
Organizations:
Sumter Adult and Community Education Center
Program: Partners for Pathways to a Brighter Future
VITA (Volunteer Income Tax Assistance Program)

Provides free income tax preparation to low-to-moderate income households and assures that individuals and families receive all eligible tax credits. VITA puts money back in the pockets of hardworking residents in Lake and Sumter Counties. This was the sixth year we hosted VITA. It remains a key strategy in our goal of supporting healthy, financially stable families.

United Way of Lake and Sumter Counties recognized Lake Technical College students in the Accounting Program for earning their VITA certifications, then volunteering their time and skills to assist with tax preparations.
* VITA RESULTS *

Residents saved $105,200 in filing fees

$719,751 in tax refunds returned to clients

Over 500 people participated in VITA

TWO locations to visit

TWO counties served

600 IRS-certified volunteers hours
2-1-1 is an information and referral hotline assisting the residents of Lake and Sumter Counties. Live operators offer free and confidential support. They also set appointment times for the clients of our Volunteer Income Assistance Program. We are looking at additional ways in which we can partner with 2-1-1 during the coming year as we strive to add agency resources and increase the public’s use of this program.

$50,000 for Lake & Sumter Counties

CONTACT CENTER STATS

- Average Wait Time: 61 seconds
- Average Contact Length: 5 min 58 seconds
- Abandonment Rate: 3%
- Customer Satisfaction: 97%
- Percentage Who Would Contact Again: 96%
2-1-1 RESULTS

7,104 PEOPLE CONTACTED 2-1-1 FOR ASSISTANCE IN LAKE COUNTY

- 27 chats, 28 texts and 3 emails were responded to
- 58% of callers sought 2-1-1 for help for the first time
- 34% were unemployed
- 29% were disabled
- 9% were retired
- 33% had no health insurance

CONTACTS BY CITIES IN LAKE COUNTY

- 21% Clermont
- 25% Other
- 13% Eustis
- 8% Mount Dora
- 6% Tavares
- 27% Leesburg

1,146 PEOPLE CONTACTED 2-1-1 FOR ASSISTANCE IN SUMTER COUNTY

CONTACTS BY CITIES IN SUMTER COUNTY

- 12% Lake Panasoffkee
- 8% Webster
- 28% Wildwood
- 12% The Villages
- 18% Other
- 22% Bushnell
United Way of Lake and Sumter Counties has served the most vulnerable and disadvantaged residents of both counties since 1966. Formed in 2002, the Human Care Network partners with 13 food pantries and fed 75,000 families that were comprised of 231,000 individuals in our 2014-2015 fiscal year.

The pantries depend on more than 900 volunteers who give over 2,000 hours of service every month to distribute food to those in need and provide other services such as:

- Nutrition Education Classes
- GED Classes
- Job Training
- Budget Management Counseling
- Life Skills Workshops and Parenting Classes

- **2,211,384 Pounds of food**
- **64,219 Families fed**
- **188,686 People fed**

### PANTRIES IN LAKE COUNTY

- Angels of Mercy: 18,132
- Beyond the Walls: 10,473
- Buses & Backpacks: 7,138
- Christian Care Center: 25,295
- Community of St. Paul: 6,379
- Faith Neighborhood: 18,135
- Fishes & Loaves: 9,712
- Joining Hands: 3,382
- Lake Cares: 21,617
- St. Vincent de Paul: 14,203
- Well of Hope: 16,665

### PANTRIES IN SUMTER COUNTY

- Hope Ministries: 16,610
- Lake Panasoffkee United Methodist: 2,751
- Salvation Army: 1,449
LAKE COUNTY

<table>
<thead>
<tr>
<th>PANTRY</th>
<th># PEOPLE SERVED</th>
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<tbody>
<tr>
<td>1  Angels of Mercy</td>
<td>18,132</td>
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<tr>
<td>2  Beyond the Walls</td>
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<tr>
<td>3  Christian Care Center</td>
<td>25,295</td>
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<tr>
<td>4  Community of St. Paul</td>
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</tr>
<tr>
<td>5  Faith Neighborhood Center</td>
<td>18,135</td>
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<tr>
<td>6  Joining Hands</td>
<td>3,382</td>
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<tr>
<td>7  Lake Cares</td>
<td>21,617</td>
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<tr>
<td>8  Loaves &amp; Fishes</td>
<td>9,712</td>
</tr>
<tr>
<td>9  St. Vincent de Paul</td>
<td>14,203</td>
</tr>
<tr>
<td>10 Well of Hope</td>
<td>16,665</td>
</tr>
<tr>
<td>11 Church of the Fisherman</td>
<td>2,215</td>
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<tr>
<td>Lake County Schools</td>
<td></td>
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SUMTER COUNTY

<table>
<thead>
<tr>
<th>PANTRY</th>
<th># PEOPLE SERVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 Hope Ministries</td>
<td>16,610</td>
</tr>
<tr>
<td>13 Salvation Army</td>
<td>1,449</td>
</tr>
<tr>
<td>14 Lake Panasoffkee United Methodist</td>
<td>2,751</td>
</tr>
</tbody>
</table>
What does it mean to Live United? It means recognizing that whether or not I know a child on the other side of town, it matters to me if that child grows up to be a contributing member of this community. High dropout rates affect the wellbeing of our entire community.

It means understanding that when any part of this community is struggling financially, it affects prosperity for us all. It means seeing that drug addiction, teen pregnancy, and family violence are problems that ripple throughout our community and that we can work together to address the conditions that contribute to these problems.

Because I have a stake in my community, I have a stake in all of these things, and a responsibility to do my part. I can use my voice and my vote to advocate for my community. I can make a difference...

UWLS believes that more successful results are made possible by the combined efforts of organizations across all sectors of the community. Non-profits who partner with other non-profits to further their missions are better able to serve their communities. Corporations and businesses are also embracing strategic relationships with non-profits in an effort to be more socially responsible and contribute to a more prosperous and safer society. When we LIVE UNITED great things can happen!
Established in 2009, the Omerine Vera Volunteerism Award recognizes an individual who has made significant contributions in Lake and Sumter Counties during the previous year. The award is presented in memory of Omerine Vera, who was an active volunteer for United Way of Lake and Sumter Counties for more than a decade.

This year's recipient is the Silver Trefoil Girl Scouts Alumnae of the Villages. This group has been partnered with the United Way of Lake & Sumter Counties for five years with the PJ's and Book program. Their undying support of children and the number of people they motivate are a true inspiration to all.

“*We become aware and then we care.*”

-Mikki Blumberg, Volunteer of the Year

For five years, United Way of Lake and Sumter Counties has distributed donations from the Pajama and Book Drive for the Silver Trefoil Group of The Girl Scout Alumnae of The Villages. There were 30 donation boxes placed in the Villages Recreation Centers that collected over 4,000 pairs of new pajamas and 2,000 books.

Community Volunteers came together to sort the pajamas and books which were distributed to homeless and foster children in Lake and Sumter Counties.
Thank you to all the companies who gave corporate gifts and to the thousands of employees who took part in workplace campaigns in 2014-2015.

Thank you for Grants from Foundations:
- The George and Maradel Sonnichsen Charitable Fund
- The C. Warren Barry Foundation
- The Dorothy B. Crooker Steve’s Charitable Foundation
- The Orland Sentinel Family Fund
- A McCormick Foundation Fund
- Lake County Health & Human Services
- Lake County Board of Commissioners

$628,540.40 earned from the TOP 10 CAMPAIGNS
Each year individuals, couples and families partner with the United Way of Lake and Sumter Counties as philanthropic leaders to significantly improve opportunities for a quality education, financial stability and a healthy lifestyle throughout the community. These donors are in addition to the thousands of employees at the Leadership Giving Levels.

These contributions are leveraged to support sustainable and measurable outcomes and meet current and emerging needs within the community. United Way of Lake and Sumter Counties Giving levels include:

- **TOCQUEVILLE SOCIETY** ~ Gifts of $10,000 or more
- **LEADERSHIP SOCIETY** ~ Gifts from $1,000 to $9,999
- **PILLARS SOCIETY** ~ Gifts from $500 to $999

**TOCQUEVILLE SOCIETY**

Tocqueville Society Membership represents annual gifts from individuals, couples, or families of $10,000 or more.

*Lyle & Carol Tuthill, The Jessica Memorial Fund*

**LEADERSHIP SOCIETY**

Leadership Society membership honors individuals, couples, or families whose annual gifts total $1,000 or more.

*James & Gail Burry*

**PILLARS SOCIETY**

Pillars Society membership recognizes individuals, couples, or families whose annual gifts total $500 or more.

*Lee Conger*
## Consolidated Statement of Financial Position

as of June 30, 2015

**Assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>1,026,152</td>
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<tr>
<td>Receivables</td>
<td>482,710</td>
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<tr>
<td>Other</td>
<td>2,506</td>
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<tr>
<td>Fixed Assets</td>
<td>4,760</td>
</tr>
<tr>
<td>Investments</td>
<td>795,460</td>
</tr>
</tbody>
</table>

**TOTAL ASSETS** >>> 2,311,588

**Liabilities & Net Assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>688</td>
</tr>
<tr>
<td>Allocations Payable</td>
<td>18,900</td>
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<tr>
<td>Designated</td>
<td>36,604</td>
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<tr>
<td>Other</td>
<td>25,234</td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>81,426</td>
</tr>
<tr>
<td>Unrestricted Assets</td>
<td>905,789</td>
</tr>
<tr>
<td>Restricted Assets</td>
<td>1,031,163</td>
</tr>
<tr>
<td>Net Income</td>
<td>211,784</td>
</tr>
</tbody>
</table>

**TOTAL LIABILITIES AND NET ASSETS** >>> 2,311,588
$1 = $16.66 in matching funds

2-1-1 number to call when someone is in need

36 number of education, income and health organizations, programs and agencies funded by United Way

$719,751 dollars VITA has returned to the local community through tax refunds

5 dollars needed to supply 28lbs of food for a hungry family

70,000 number of families at risk of food insecurity in Lake and Sumter counties

1 person it takes to join in and help make a lasting difference

$500,000 invested in education in Lake & Sumter counties

$719,751 dollars VITA has returned to the local community through tax refunds

2,211,384 pounds of food that was distributed to feed the hungry in 2014-15