Dear Friends and supporters,

Annual reports are like birthdays – they provide us with the chance to reflect on the year just past and make public promises about the future. The United Way of Charlotte County continues to fill gaps in services and address unacceptable human conditions by drawing upon our own resources as well as those available throughout our community. We believe that we can accomplish more by working with our volunteers and community partners than we could ever do alone.

We are working to identify the most pressing community needs in Charlotte County. This past year, we launched a comprehensive community needs assessment that will measure social, health and public safety services. The assessment will include data from health and human service organizations, community groups, non-profit agencies, and Charlotte County residents. Once completed in the summer of 2013, it will be available online as a community resource for planning present and future goals, grant preparation and capacity building purposes.

Our mission – to improve lives by mobilizing the caring power of our community – says it all. People and businesses are looking for ways to reach out a hand... to volunteer, to persevere. As we continue to work together to advance the common good, we will be better positioned to make positive impact even during these challenging times.

Thank you for supporting the United Way of Charlotte County.

Sincerely,

Charlotte Miller
Immediate Past President

Carrie Blackwell Hussey
Executive Director
Our Partner Agencies

Your contribution to the United Way of Charlotte County supports the 55+ programs at these Partner Agencies who meet high standards of effectiveness and efficiency while delivering lasting and quantifiable results:

**EDUCATION**
Big Brothers/Big Sisters of the Suncoast
Boy Scouts, Southwest Florida Council
Boys & Girls Club of Charlotte County
Charlotte Local Education Foundation
Children’s Home Society of Florida
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

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

**HEALTH**
Alzheimer’s Association
Charlotte County Healthy Start Coalition
Charlotte Behavioral Health Care
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

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:

**1047** homeless adults and kids were provided with a warm place to sleep and received services that assisted their pursuit of permanent housing

**423** adults who were addicted to drugs and alcohol were rehabilited in a structured residential treatment program

**3800** low-income Charlotte County residents without health insurance received medical care and prescriptions at no cost

**2217** school-age children learned crucial life skills and leadership development through volunteer led activities, teaching them to be responsible citizens and future leaders in the community

**4800** adults and children were served hot and nutritious meals because they did not have resources to buy or prepare food on their own

**975** parents received scholarships to help pay for child-care allowing them to work and provide for their families
A special thank you to the following community-minded businesses for their generous support during our 2011-2012 campaign:

**Publix Super Markets $300,000+**
Charlotte County Public Schools $31,550.00
SunTrust Bank Gulf Coast $29,500.00
Mosaic Fertilizer LLC,
  Community Relations $29,000.00
Florida Power & Light $26,450.80
Charlotte County Government $17,678.00
Peace River Distributing, Inc. $15,905.08
SunCoast Media Group $12,277.30
Wal-Mart $12,249.50
UPS $10,054.00
Bank Of America $8,968.76
City Of Punta Gorda $6,160.00
Charlotte State Bank $5,880.00
Target Stores #690 $5,035.38
Macy’s Florida Stores, LLC $4,831.32
Edison State College $4,177.00
Fawcett Memorial Hospital $3,749.00
Waste Management $3,736.60
Gulf Coast Community Foundation of Venice $3,378.60
Federal Express $2,934.09
JC Penney Company, Inc. $2,491.66
Englewood Bank $2,028.00
Peace River Regional Medical Center $1,895.00
Center for Abuse and Rape Emergencies (C.A.R.E.) $1,802.00
Macy’s Corporate Services $1,762.84
CenturyLink $1,690.00
Best Buy $1,286.00
Englewood Community Hospital $1,150.00
Charlotte County Property Appraiser $1,128.00
Brooks-Howe Memorial Fund $1,000.00
Fifth Third Foundation $1,000.00

We sincerely thank each and every one of our contributors, for without them we could not continue to provide the level of support and services that make such a large impact on our community. The donors to the United Way of Charlotte County at the Leadership Level extend a very personal and very powerful commitment to making a difference here in Charlotte County.

**ALEXIS DE TOCQUEVILLE SOCIETY**
Named for the young Frenchman, who in the early 1800’s traveled throughout the country and wrote in admiration of the American spirit of voluntary effort and philanthropy for the community 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.

$10,000+
Mark and Linda Formica
Howard Jenkins

**KEEL CLUB ADMIRAL**
$5,000+
Robert & Janet Wenzel
Rachel A. Youmans

**KEEL CLUB COMMODORE**
$2,500 - $4,999
Michael H. Garcia
Jim & Kathy Silverberg
John & Sarah Singer
Steven J. Vito

**KEEL CLUB CAPTAIN**
$1,500 - $2,499
Jerome and Peggy Cohen
Kimberly Davids
Nicholas DiGregorio
Frank Eldred
Kristie Frawley
Robert Giordano
Carleton & Almut Haswell
Alan & Bonnie Holbach
Mark Moss
Nichole Raphial
Heather Sanborn
Dimitrios James & Ann Vellonakis
David & Kay Wagner
Chris & Elizabeth Wenzel

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**2011 - 2012 Corporate Partners**

**2011-2012 Leadership Circle**

-- UPS employees donating their day by volunteering at the Charlotte County Homeless Coalition.

-- SunTrust Bank employees volunteering through United Way’s Day of Caring. Volunteers spent hours packing rice and beans for C.H.A.P.S. Food Pantry and Harry Chapin Food Bank.

-- Publix Super Markets presenting a $10,000 check to United Way Partner Agency, the Charlotte County Homeless Coalition.

-- Fawcett Memorial Hospital staff pose at the Virginia B. Andes Volunteer Community Clinic grand opening. The clinic has dozens of doctors, pharmacists, nurses and other medical professionals who volunteer to treat thousands of uninsured Charlotte County residents.
2011-2012 Leadership Circle

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

Ballapuram & Meera Adhinarayanan
Bernard Milosky

Ginny Allegretti
Frank & Linda Muller

Regina R. Anderson
Mark Murphy

Henry Bellinger
Sue B. Mustari

Isola Burns
Glen Nickerson

Ken & Pat Cargill
Chad P. Noble

Karen Comer
Brandi Nolette

Jennifer R. Copeland
Colleen Norton

Danny Copeland Jr.
Eric Norton

Fran Cornwall
David Palumbo Jr.

Joanne D’Ambrosia
Chris Porter

Traci Dalton
Mark Porterfield

Thomas Dominici
Bill Pretsch

Fay A. Donaghy
Victor M. Reeves

Christine Dote
Dane Register

Keith Dragon
Tom & Linda Rice

Robert Dwyer
Bobby Rich

Deborah H. Fitzgerald
Jose Rivera

Joseph Foster
Jay Roughton

Jane S. Frederick
Brick Rule

Nathan Friend
Raymond J. Sandrock

Joseph Giangreco
Sandra K. Scheel

JoAnn P. Helphenstine
Garnett Scholl

David J. Higginbotham
Robert & Sue Sifrit

Chris Hobson
Derrick Simone

Kyle J. Hoffman
Eleanor Skinner

Jason D. Horvath Sr.
Steven Soto

Tamara Horvath
Matthew Stancil

Paul A. Jackomin Jr.
David Stepp

Bradley Jaros
Brett Tessier

Peter Karuba
Robert & Linda Tetrault

James P. Kerrigan IV
Laura G. Thomson

Kimberly A. Koennemann
Gerald F. Tinsley

Charles Koons
Paul J. Toma

Christina Kovitch
Keith S. Tucker

Patricia Land
David Turkett

Tracy Lanum
John Via

Sonya Lawman
Cynthia Vogel

Frank & Jill Leggio
Autumn L. Voigt

Douglas Lowndes
James R. West

Jarrett Malanowski
Robert West

Maura Matzko
Adam B. Wilkie

Ruthanne McDaniel
Lorolei J. Wilkins

Charles McNamee
Darrel E. Wilson

Charlotte Miller
Laurie A. Wilson

Thomas Milican
Melissa Zockine

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

KEEL CLUB LIEUTENANT $750 - $999

Don Ashley PA
Roy & Julie Kern

Catherine Ziegler
Mike L. Laidler

Bixenman
Peggy A. McCormack

Alex Chang
Donna L. McCrea

Janet L. Campbell
Dennis Mitrano

Deborah A. Coppens
John Nardini

Melissa D. Ellison
Tony Oplinger

Bill French
Victoria P. Popadiuk

Sherri L. Rayburn-Fields
Randal Ross

W. Kevin Russell
Shelly Scott

Mary Skaggs
Glen R. Storm

Robert Woodmansee

KEEL CLUB MIDSHIPMAN $500 - $749

Steve Adams
Choi Wai

Jean M. Andreu
Kimberly Corbett

Robert & Joan Andrews
Bill & Bobby Cromer

Deborah Bauck
DeborahArena Bauck

June S. Baumhardt
Scott A. Davis

John & Cynthia Beane
Jeanette Deptula

Valerie A. Beck
Melinda Diedrick

Garry L. Bingham
Michael Edlin

Jane S. Brenner
Thomas Eiden

Christine Burke
Deborah Forester

Brian & Mary Kay Burns
Jerrine M. Goff

Robert and
Rosalea R. Goff

Virginia Caldwell
Richard A. Hackney

Robert Hancock
Sarah Plummer

Jeffery Hay
Rebecca A. Register

Kristin Holland
Edward Reid

Evan J. Hollister
Gary Sands Jr.

Chris R. Holt
Anthony M. Simmons

Eric Hulnick
Elena A. Smith

Paul A. Jackomin Sr.
Samantha Smith

Jacqueline C. Kinney
Sandra Smith

Kimberly K. Klocke
Vernoica J. Sturtevant

Kim Korbetts
Gene H. Taylor

Howard Kunik
Samantha Taylor

Kyle Lafleur
Wayne Theiss

Edmund Vient
Larry Thomas

Dennis G. Lambert
Aron Tobolski

Nathan Lane
Gregg Tubbs

Susan Leeman
Edmund Vient

Kelli L. Lichtenberg
Eliza Viner

Richard P. Lundgren Jr.
Heide J. Walsh

Linda Lusk
Valerie Walsh

Julie C. Mathis
Brittany L. Whitford

Curt & Doris Mayer
Dick & Marge Whitney

James & Mary McCullough
Douglas K. Whittaker

Sean M. Wozniak
Philip Wickstrom

For more information on how to become a leadership donor, or if your name has been omitted, please call 941-627-3539.
STATEDMENT OF FINANCIAL POSITION
for the fiscal years ended march 31, 2012 and 2011

ASSETS

Current Assets

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$409,259</td>
<td>$55,602</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>0</td>
<td>102,841</td>
</tr>
<tr>
<td>Pledges receivable - net allowance for uncollectible pledges</td>
<td>448,384</td>
<td>500,878</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>2,622</td>
<td>1,779</td>
</tr>
<tr>
<td>Endowment fund investments</td>
<td>369,346</td>
<td>609,893</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>1,229,611</td>
<td>1,270,993</td>
</tr>
</tbody>
</table>

Noncurrent Assets

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property and equipment - net of accumulated depreciation</td>
<td>619,266</td>
<td>639,882</td>
</tr>
<tr>
<td>Deposits</td>
<td>276</td>
<td>276</td>
</tr>
<tr>
<td>Total Noncurrent Assets</td>
<td>619,542</td>
<td>640,158</td>
</tr>
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</table>

Total Assets

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Liabilities</td>
<td>1,214,142</td>
<td>1,290,058</td>
</tr>
<tr>
<td>Net Assets</td>
<td>635,011</td>
<td>621,093</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>$1,842,153</td>
<td>$1,211,151</td>
</tr>
</tbody>
</table>

LIABILITIES AND NET ASSETS

Current Liabilities

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts and taxes payable</td>
<td>$8,578</td>
<td>$4,550</td>
</tr>
<tr>
<td>Prepaid pledge</td>
<td>85,711</td>
<td>5,000</td>
</tr>
<tr>
<td>Current accrued agency allocations</td>
<td>365,588</td>
<td>422,087</td>
</tr>
<tr>
<td>Grants payable</td>
<td>295,902</td>
<td>316,553</td>
</tr>
<tr>
<td>Current maturities of long-term debt</td>
<td>16,609</td>
<td>15,543</td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>772,388</td>
<td>763,733</td>
</tr>
</tbody>
</table>

Long Term Liabilities

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noncurrent accrued agency allocations</td>
<td>0</td>
<td>68,522</td>
</tr>
<tr>
<td>Long-term debt - net of current maturities</td>
<td>441,754</td>
<td>457,803</td>
</tr>
<tr>
<td>Total Long Term Liabilities</td>
<td>441,754</td>
<td>526,325</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>1,214,142</td>
<td>1,290,058</td>
</tr>
</tbody>
</table>

Net Assets

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted assets</td>
<td>612,503</td>
<td>524,991</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>22,508</td>
<td>96,102</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>635,011</td>
<td>621,093</td>
</tr>
</tbody>
</table>

Total Liabilities and Net Assets

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Liabilities</td>
<td>1,842,153</td>
<td>$1,211,151</td>
</tr>
</tbody>
</table>

COMMUNITY IMPACT COMMITTEE

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.

Through a structured funding process, the volunteers ensure that the funds given through the United Way are being used wisely and make a difference in our community. The needs in our community are evaluated, and priorities for human service programs are established. Each partner agency is visited and reviewed to assure that the funds given through United Way are being used accountably. Only after careful consideration are the funding recommendations made for each agency.

United Way of Charlotte County is the fiscal agent for Charlotte County and City of Punta Gorda government dollars designated to health and human services organizations. The United Way receives no administrative fee to provide this service.

EMERGENCY FOOD AND SHELTER

Every year resources to address special emergency needs in our community are distributed through FEMA’s Emergency Food and Shelter Program by a local volunteer board. This program focuses on economic emergency needs rather than disaster related emergencies, and it supplements feeding and sheltering efforts in ways that make a difference for our citizens. The local Emergency Food and Shelter Board is responsible for allocating the funds. The United Way of Charlotte County does the administrative work for the program by reviewing all the reports and making sure everything is in order before it is sent to the national board.

SEASON OF SHARING

Season of Sharing is a 13-year community-wide fundraising partnership created by the Herald-Tribune Media Group and the Community Foundation of Sarasota County. The United Way of Charlotte County is the fiscal agent for these funds in Charlotte County. These funds are ‘last resort’ funds for individuals or families that are on the verge of homelessness.

UNITED WAY GRANT BREAKDOWN

Total Allocated: $1,258,263.83
(Percent of total funding represented in pie chart)
Our Mission
To improve the lives of Charlotte County residents by mobilizing the caring power of our community.