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
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.

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 2nd in the state, as well as 2nd 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

**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

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.
- **4950** 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.
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.

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

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

Macy’s
City Of Punta Gorda
UPS
Wal-Mart
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
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

**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.**

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

**Keel Club Midshipman**

$500 - $749

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

<table>
<thead>
<tr>
<th>ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2013</td>
<td>2012</td>
</tr>
<tr>
<td>Current Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$361,387</td>
<td>$409,259</td>
</tr>
<tr>
<td>Rent receivable</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>Pledges receivable – net allowance for uncollectible pledges</td>
<td>329,044</td>
<td>343,854</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>1,529</td>
<td>2,622</td>
</tr>
<tr>
<td>Endowment fund investments</td>
<td>383,345</td>
<td>369,346</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>1,075,805</td>
<td>1,125,081</td>
</tr>
<tr>
<td>Noncurrent Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property and equipment – net of accumulated depreciation</td>
<td>599,901</td>
<td>619,266</td>
</tr>
<tr>
<td>Deposits</td>
<td>276</td>
<td>276</td>
</tr>
<tr>
<td>Total Noncurrent Assets</td>
<td>600,177</td>
<td>619,542</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$1,675,982</td>
<td>$1,744,623</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2013</td>
<td>2012</td>
</tr>
<tr>
<td>Current Liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts and taxes payable</td>
<td>$7,258</td>
<td>$8,578</td>
</tr>
<tr>
<td>Prepaid pledge</td>
<td>0</td>
<td>85,711</td>
</tr>
<tr>
<td>Accrued agency allocations</td>
<td>352,197</td>
<td>365,588</td>
</tr>
<tr>
<td>Grants payable</td>
<td>298,277</td>
<td>295,902</td>
</tr>
<tr>
<td>Current maturities of long-term debt</td>
<td>17,747</td>
<td>16,609</td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>675,479</td>
<td>772,388</td>
</tr>
<tr>
<td>Long Term Liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long-term debt – net of current maturities</td>
<td>426,089</td>
<td>441,754</td>
</tr>
<tr>
<td>Total Long Term Liabilities</td>
<td>426,089</td>
<td>441,754</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>1,101,568</td>
<td>1,214,142</td>
</tr>
<tr>
<td>Net Assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted assets</td>
<td>513,874</td>
<td>507,973</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>60,540</td>
<td>22,508</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>574,414</td>
<td>530,481</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
<td>$1,675,982</td>
<td>$1,744,623</td>
</tr>
</tbody>
</table>

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.

UNITED WAY GRANT BREAKDOWN
Total Allocated: $1,112,452.76
(Percent of total funding represented in pie chart)
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
17831 Murdock Circle, Suite A
Port Charlotte, FL 33948
941.627.3539
www.unitedwayccfl.org