



United Way of the Florida Keys

2012 ANNUAL REPORT

HOW WE BRING NEIGHBORS AND RESOURCES TOGETHER TO IMPROVE LIVES



LIVE UNITED

United
Way



WWW.KEYSUNITEDWAY.ORG

A LETTER FROM MARGIE SMITH

PRESIDENT AND CHIEF PROFESSIONAL OFFICER

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LIVE UNITED



United Way of the Florida Keys



Dear Friends,

Your local United Way funds non-profit organizations providing critical services for our neighbors in need. We are now concluding our 30th year serving our Keys-wide community (and the 125th year anniversary since United Way began) and there is so much to be thankful for. As an independent local 501(c)(3), **money raised in the Keys stays in the Keys** as it always has, and we have had an astonishing year of expanded participation by organizations in our work and engagement by volunteers at all levels.

In 2012, we funded 18 programs that helped working families function, so that our economy can keep running. I guarantee that if you have been in the Keys for more than two weeks, you know someone – a neighbor, friend or family member – who has been directly, positively-impacted by our work. For instance, you may have co-workers who have been able to come to work in the morning because they were able to find enriching and affordable child care offered by a United Way-funded child care provider.

We vet our agencies carefully through a transparent, competitive process, and then with the help of volunteers select the programs that provide compelling solutions for our community needs. What a learning opportunity it is to review the work of these organizations, many of them providing comprehensive support and care for working families in the Keys, and doing it on a shoestring.

Two years ago, our United Way took a new direction with community impact focus areas of **1) access to quality nutritious food** and **2) early childhood and youth development**. Now into 2013, we can talk about specific progress in these two areas since the programs we funded in 2012 all had measurable goals.

What can you do to make your community better for all?

Give. United Way is not funded by any government source, but primarily the donations of businesses and individuals in the Keys. Giving through United Way can be highly leveraged as we are the approved local match for state, federal or foundation grants. For instance, Wesley House receives matching funds at an astounding \$16 for every \$1 provided through United Way.

Advocate. We have seen great strides in awareness of our work locally but are missing your engagement. Come join the conversation about local charities through our social media, our talk about issues for children and the hungry as a member of our community impact committees.

Volunteer. You have many opportunities to get involved, from helping collect school supplies for kids in our August "Stuff the Bus" drive...to assisting with campaign presentations and events...to visiting non-profits in the spring and helping us decide which programs to fund. Please visit keysunitedway.org or give us a call at 735-1929.

Many residents of our community have been supporting the United Way for many years, so thank you. As we look back at all the progress we made in 2012, we know we couldn't do it without you.

Give. Advocate. Volunteer. LIVE UNITED.

WHO WE ARE

2012-13 BOARD OF DIRECTORS

The United Way of the Florida Keys has been a valued community partner since it was founded in 1981. It is a local organization guided by neighbors you know, volunteers who live and work right down the street. It is governed by an active and responsible governing body whose members serve two-year terms and have no material conflict of interest.

EXECUTIVE BOARD – TERMS EXPIRING 2014

Chairperson

CANDY FINCKE, Mariners Hospital

Vice Chair & Campaign Chair

LEAH MAKI, Ocean Sotheby's International Realty

Treasurer

TRICH WORTHINGTON, IBERIABANK

Secretary

ERIN O'HARA, Publix Supermarkets

Past Chair

ANDY GRIFFITHS, JR., Andy Griffiths Charters

NEW MEMBERS IN 2012 - TERMS EXPIRING 2014

NIKKI DUNN, Marketing Consultant

JOHN EMERY, Lower Keys Medical Center

MARIA JONES, Florida Keys Electric Cooperative

RON SMITH, Hawks Cay Resort

JOHN SPAIN, Keys Event Management

TERMS EXPIRING 2013

DALE BITTNER, BB&T

REBECCA HORAN, Atlantic Pacific Insurance

KARA LUNDGREN, Hampton Inn and Suites

MINDY MCKENZIE, Samuel's House

ARIANNA NESBITT, Healthy Start (Non-Profit Seat)

ADVISORY BOARD

WAYNE MARKHAM, Publisher, Keynoter/Reporter

MIKE FELTMAN, Retired Lt. Colonel, U.S. Air Force

TIM MALONEY, District Manager, Publix Supermarkets

MIKE PUTO, Consultant

RICK RAMSAY, Sheriff, Monroe County

STAFF

MARGIE SMITH, President & Chief Professional Officer

JENNIFER RICKMANN, Office Manager

SCHEDULE OF 2013 BOARD MEETINGS

All regular meetings of the United Way Board of Directors are scheduled for 9:30 a.m. at IBERIABANK, Marathon Shores:

January 17, February 21, March 21, April 18, May 16, June 20, July 18, August 15, September 19, October 17, November 21 and December 19.



Our annual meeting was held on August 9, 2012 at Hawks Cay Resort.

Thank you to the over 100 people who attended and to our sponsors: Centennial Bank, Lower Keys Medical Center, Baptist Health South Florida, and Publix Supermarkets.

Pictured left to right: incoming board chair Candy Fincke, outgoing chair Andy Griffiths Jr., and president Margie Smith.

NEW BOARD MEMBER REQUIREMENTS

Adopted in 2012 as part of a comprehensive overhaul of our Bylaws:

- Regularly attend board meetings and important related meetings.
- Dedicate hours of active participation to committee work each month.
- Volunteer for and willingly accept assignments, and complete them thoroughly and on time.
- Prepare well for meetings, and review and comment on minutes and reports.
- Respond to communications in a timely manner.
- Help build collegial working relationships that contribute to consensus.
- Participate in fundraising for the organization.
- Complete a minimum of five (5) campaign presentations per year.
- Make an annual financial contribution of a meaningful and significant amount.



Left to right: Board members Ron Smith, Mindy McKenzie, Trich Worthington, Rebecca Horan, Candy Fincke, Erin O'Hara, Maria Jones, Nikki Dunn, Leah Maki, John Emery, Jennifer Rickmann (staff), John Spain, Margie Smith (president). Not pictured: Andy Griffiths, Dale Bittner, Kara Lundgren, Arianna Nesbitt.



DIVIDING DONOR DOLLARS

UNITED WAY'S 2012-13 PARTNER AGENCIES



United Way of
the Florida Keys

FUNDED PROGRAMS

DOLLARS

ACCESS TO NUTRITIOUS FOOD	Burton Memorial Food Pantry Upper Keys Food Pantry - Disburse packaged foods, as well as prepared meals on Thursday evenings.	852-2581	\$11,666.67
	Florida Keys Children's Shelter Food Fund Challenge - Purchase food for children in shelters; secure donors to match this United Way grant.	852-4246	\$5,833.33
	Grace Jones Backpack Program Weekend Food Program - Expand program to the Upper Keys; continue feeding 250+ children each weekend.	743-6064	\$11,666.67
	KAIR Food Pantry Middle Keys Food Pantry - Upgrade electrical system; purchase food; and develop a healthy eating brochure.	743-4582	\$14,000.00
	Monroe Association for ReMARCable Citizens Meals & Job Training - Feed 27,500 healthy lunches; reduce client obesity by 10%; provide job training in café.	294-9526	\$9,333.33
	Star of the Sea Food Pantry Key West Food Pantry - Distribute 40% fresh produce vs. 60% canned and prepared (currently 20% fresh).	(937) 644-9801	\$11,666.67
EARLY CHILDHOOD & YOUTH DEVELOPMENT	Anchors Aweigh Club Substance Abuse Education - Distribute literature to the public including teens, parents and future parents.	296-7888	\$2,916.67
	Boy Scouts of America, South Florida Council Youth Mentoring - Build measurable increases in Monroe County participants' personal values and fitness.	872-3228	\$1,166.67
	Boys & Girls Clubs of the Keys Summer Program - Scholarships for summer child care in Big Pine Key and Key West.	296-2258	\$11,666.67
	Domestic Abuse Shelter Community Education - Outreach and preventative education aimed at youth.	743-4440	\$4,666.67
	Florida Keys Outreach Coalition Children's Corner - Provide a safe, supervised learning environment for homeless children.	294-0304	\$11,666.67
	Girl Scouts of Tropical Florida Youth Mentoring - Mentoring for at-risk girls participating in the "Get Real" program.	305-253-4841	\$3,500.00
	Marathon Recreation Center After School Care - Provide a place for children and teens to get homework assistance and life skills.	743-4164	\$11,666.67
	Wesley House Family Services Child Care Services - Assist low-income families with the cost of child care. Matched 16:1 by state grant.	809-5000	\$11,666.67
	Womankind Teen Health Clinic - Provide office visits, tests and education for at least 180 unique teen patients.	294-4004	\$4,666.67
	YMCA Upper Keys Summer Camp - Provide scholarships; support knowledge of reading and Marine Biology.	451-3122	\$6,416.67
EMERGENCY	American Red Cross Emergency Services - Respond to needs of 22-30 Keys residents after house fires and other disasters.	852-9612	\$2,333.33
	Helpline 2-1-1 Emergency Referral Hotline - Refer residents in need to support from agencies in Monroe County.	296-4357	\$9,333.33

TOTAL UNITED WAY COMMUNITY SUPPORT (APRIL '12-MAY '13)

\$145,833.33

2012 YEAR IN REVIEW

UNITED WAY HELPS GET MORE FOOD TO THE HUNGRY

SPECIAL THANKS TO A GRANT FROM THE OCEAN REEF COMMUNITY FOUNDATION

Three days a week, families in need gather at the Burton Memorial Methodist Church where a food bank is open from 9 a.m. to noon.

Church volunteers, supplemented by community volunteers, also staff an evening dinner on Thursdays from 5-7 p.m.

The number of families and the number of children who are helped by this and other food pantries in the Keys continues to grow, said the Rev. Kerry Foote, pastor of Burton Memorial.

“We’re seeing 50 to 60 families a week. The vast majority are people who have jobs, they pay rent or have a house, but these are the working poor. They make too much money to get on substantial government assistance, but not enough money to make ends meet. And after paying the bills, what suffers is food to feed their family,” Foote said.

There are more smiles these days when folks see a bright green truck arrive at the church food bank, bearing fresh produce and meat donated by Publix and Winn-Dixie supermarket managers, who participate in the South Florida Food Consortium.

Until recently, there were no fresh food deliveries to Burton Memorial or other food pantries operating in the Upper Keys. That is until the United Way of the Florida Keys convened a meeting of Keys food pantries and Paco Valez, who heads Feeding South Florida.

“This past year, we focused on bringing stakeholders together to tackle basic needs for food in our community,” said Candy Fincke, newly-elected chair of the United Way’s Keys governing board.

“Our president, Margie Smith, worked with Feeding South Florida to convene a Keys summit. As an outgrowth of

ERIN O’HARA OF PUBLIX WITH BOB THOMAS



that work, food pantries in the Upper Keys now get access to fresh produce and meat donated by Winn-Dixie and top donor Publix. The refrigerated truck recovering the donated food in the Upper Keys is funded by a grant from the Ocean Reef Community Foundation.

“United Way and Margie Smith were the catalyst to get this going,” the Rev. Foote said. “We got 750 pounds of fresh food over the first two weeks the program was up and running.”

United Way also funds KAIR food pantry in Marathon and Star of the Sea in Key West.

In four hours’ time, United Way volunteers successfully delivered box loads of supplies to all 18 public schools in Monroe County – from Key Largo to Key West.

Shoppers at Publix stores Keys-wide donated \$3,150 by purchasing “SCHOOL TOOLS for Cool Kids” cards in denominations of \$5, \$7 or \$10. Community members also shopped at Office Depot in Marathon and Key Largo, and OfficeMax in Key West, using wish lists that principals of each school submitted to United Way. In addition to items purchased by store patrons, Office Depot and OfficeMax each donated thousands of dollars of additional supplies.

ANOTHER SUCCESSFUL “STUFF THE BUS” SCHOOL SUPPLY DRIVE



SUPERINTENDENT OF SCHOOLS MARK T. PORTER & KEY WEST HIGH PRINCIPAL AMBER BOSCO WITH UNITED WAY VOLUNTEERS MARY CHASE, REBECCA HORAN AND CHUCK FORTIER

RAISED: \$257,220

2011 CAMPAIGN - TOP FUNDERS

United Way



United Way of the Florida Keys

1.	PUBLIX SUPERMARKETS	\$72,916
2.	MARINERS HOSPITAL	\$22,000
3.	MONROE COUNTY SCHOOLS	\$18,992
4.	HAWKS CAY RESORT	\$14,565
5.	BANK OF AMERICA	\$13,481
6.	AT & T	\$13,474
7.	IBERIABANK	\$13,371
8.	FLORIDA KEYS AQUEDUCT AUTHORITY	\$9,910
9.	FLORIDA KEYS ELECTRIC COOPERATIVE	\$9,880
10.	FLORIDA POWER & LIGHT	\$9,517
11.	UNITED PARCEL SERVICE	\$8,173
12.	MONROE COUNTY EMPLOYEES	\$6,180
13.	STATE EMPLOYEES	\$5,872
14.	KEYS ENERGY	\$5,044
15.	FEDERAL EMPLOYEES	\$4,261
16.	COMCAST	\$3,923
17.	FLORIDA KEYS MOSQUITO CONTROL	\$3,567
18.	IBM	\$3,390
19.	CAPITAL BANK	\$2,280
20.	RAYMOND JAMES	\$2,242
21.	FEDERAL EXPRESS	\$2,114
22.	BB&T	\$2,112
23.	OCEAN REEF COMMUNITY ASSOCIATION	\$1,849
24.	WESLEY HOUSE	\$1,229
25.	KEYNOTER PUBLISHING	\$1,204



Publix Supermarkets remains our #1 supporter with \$41,616 in employee paycheck contributions pledged to the 2011 campaign, plus a corporate gift of \$31,300.

We surpassed our \$240,000 fundraising goal for the 2011 campaign. Ultimately, we aim to double our campaign to \$500,000 by the year 2015.

These numbers include both employee donations and corporate matches. Most of our top 20 campaigns had increases in giving over 2010.

More individuals and more businesses choose to make their charitable impact through United Way than any other local non-profit organization.

LIVE UNITED 

WWW.KEYSUNITEDWAY.ORG

THANK YOU TO OUR TOP DONORS

2011 CAMPAIGN ENDING MAY 30, 2012

TOCQUEVILLE SOCIETY

\$10,000+

LOOKOUT FOUNDATION
MARCY AND ROBERT WOLPE

LEADERSHIP DONORS

\$1,000+

MARY AKERS
ROBERT E. AUER
PAUL BEAN
DALE BITTNER
JACK BRIDGES
JANET CATANI
MARY CHASE
CHERYL COTTRELL
SHERRY COX
AMANDA DORRIS
CANDY FINCKE
RICHARD FREEBURG
WENDY GENTES
FRANCENE GLICK
ANDY GRIFFITHS JR.
DALE HARPER
DAWN HIRE
RICHARD HUFFMAN

TERESA KWALICK
LAURA LANCASTER
SUSAN LANGHORNE
STEVEN LEVINE
GAYLE MAIMO
TIMOTHY MALONEY
WAYNE MARKHAM
RICHARD MATHEWSON III
JILL MIRANDA BAKER
ROBERT R. PADRON
RHONDA PIPER
KEVIN PIPER
JEFFREY SMITH
DAWN STAVOR
JOHN STUART
SUZANNE SUAREZ
WILLIAM S. VALBERT
PATRICIA WORTHINGTON

BECOME A UNITED WAY LEADERSHIP DONOR



It is in a large part because of our Leadership donors that we are able to make an impact on our Florida Keys community.

You will be recognized at our annual meeting each summer and in the local newspapers at the time of the annual meeting.

Your name will also be listed on our web site and annual report.

It's easy to be a Leadership donor through \$38.46 paycheck deductions, monthly checking account drafts, or give online at keysunitedway.org/give.

2011 CAMPAIGN HIGHLIGHTS

- ♦ **Bank of America** - Employee contributions more than quadrupled, up from \$756 to \$3,481
- ♦ **BB&T** - Doubled its number of donors (5 to 10) and contributions (\$660 to \$2,112)
- ♦ **Comcast** - A first time campaign, with 23 out of 61 employees donating \$1,664, plus a corporate gift
- ♦ **Florida Keys Aqueduct Authority** - Huge increase in new donors (62 vs. 23); donations of \$9,910 versus \$2,490
- ♦ **Florida Keys Electric Cooperative** - The same number of donors increased their gifts to \$9,880, up from \$4,523
- ♦ **Florida Keys Mosquito Control** - Increased donors and contributions (\$593 to \$3,567)
- ♦ **Hawk's Cay** - First presentation in several years – HUGE turn-out of 165 employees pledging \$14,565
- ♦ **Iberia Bank** - Nearly 100% participation; nearly 50% of all Iberia employees donated \$500 or more
- ♦ **Keys Energy Services** - Big donations of \$5,044, up from \$2,920 in the 2010 campaign
- ♦ **Mariners Hospital** - Employees donated a total of \$12, 498 (up from \$2,886 in 2010 campaign)
- ♦ **Publix** - Raised nearly \$10,000 more in employee contributions (\$36,775 up from \$26,793 in 2010 campaign)
- ♦ **UPS** - New donors coming on board increased total contributions from \$4,061 to \$8,173

OUR OPERATIONS

MISSION STATEMENT

"To be the Leader in Community Caring."

AN OPEN-BOOK POLICY

In an effort to be as accountable as possible, the United Way of the Florida Keys is open and transparent when it comes to its financial records. Monthly statements are compiled by our board treasurer, and our audit was conducted by Oropeza & Parks, an independent firm. These documents are available by request and at Guidestar.org.

2012 FINANCIAL SNAPSHOT (Audit year ending 12-2011)

LINE ITEM	AMOUNT
Beginning net assets	\$431,734
Total revenue & other support	\$420,376
Distribution to Monroe County agencies	(\$125,000)
Distribution to others	(\$5,300)
Payments to affiliates	(\$2,975)
Program expenses	(\$47,476)
Fundraising expenses	(\$14,990)
Administrative expenses	(\$97,475)
Ending net assets	\$558,894

MEMBERSHIP REQUIREMENTS

Each year, the United Way of the Florida Keys must prove that it meets 14 requirements for United Way of Worldwide membership. The United Way standards of accounting and governance are much higher the Internal Revenue Service requires of other non-profit organizations.

GUIDESTAR EXCHANGE

The United Way of the Florida Keys is one of very few local charities that has received this seal, only achieved by making detailed financial information available to the public online. If you are happy with our organization, please post a positive review at Guidestar.org.



In 2012, our rent including utilities and Internet was \$425 a month. Only two employees cover our work throughout the Keys. Thanks to a bequest from an individual in our community, we were able to hire the second full-time staff member without using funds from campaign donors.

OUTSOURCING FOR EFFICIENCY

2012 was the first year with our accounting and data management outsourced to Heart of Florida United Way in Orlando.

The transition was a success with more frequent, expanded reporting than with our previous vendor. Moving our back-office operations required a large commitment of time in 2012 but will reap rewards in the upcoming decades. With better information about our donors, we are able to communicate with them more effectively.

The staff and board of the United Way of the Florida Keys is grateful for gifts in-kind that allow us to keep our operations lean. We participated in Florida Keys Day in Tallahassee in 2012 thanks to travel assistance from the Monroe County Sheriff's Office.



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