



# ANNUAL REPORT

2019-2020



United Way  
Emerald Coast

We serve donors, advocates and volunteers with the organization and leadership they require to provide financial stability, education opportunities, and healthy lives to their community.

We envision a community where resources are aligned to ensure people are healthy, families are strong, and youth and adults are engaged in strengthening social bonds.

# OUR MISSION

# OUR VISION

## WE FIGHT FOR ALICE

Our community is home to many hard-working families who live paycheck to paycheck; for them, reduced hours, a family emergency, or unexpected expense can be catastrophic. We refer to these families as **ALICE**. ALICE is a United Way acronym that helps us define financial insecurity in our region. It stands for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed and represents our neighbors, daycare teachers, grocery store associates, hotel clerks, home health aides, and more. They are absolutely essential to our community's success.

The bottom line is, ALICE households are forced to make difficult choices. They often skip preventative healthcare, accredited child care, quality food, or car insurance to get by. These "savings" threaten their health, safety, and future, and the costs are high for both ALICE and the wider community. That's why United Way Emerald Coast fights everyday to make sure ALICE households have access to basic necessities like affordable healthcare, quality education, and financial support when they need it the most.

### ALICE IN OUR COMMUNITY



of all households in Okaloosa and Walton counties fall below the ALICE threshold. That breaks down to 13% living below the Federal Poverty Level and 27% making less than the Household Survival Budget. This means that nearly 43,000 local families are struggling to make ends meet.

Critical needs exists across all of our community, but we find the highest ALICE rates in more rural areas, like Defuniak Springs, where 62% of households live paycheck to paycheck.

<b>DEFUNIAK SPRINGS - 62%</b>
<b>REDBAY - 59%</b>
<b>PAXTON - 54%</b>
<b>LAUREL HILL - 51%</b>
<b>FREEPORT - 47%</b>

The 2020 United Way ALICE Report: Florida can be found at: <https://www.uwof.org/alice>  
County-by-county details from the 2018 ALICE report can be found at: <https://www.unitedforalice.org>

### ALICE WORKS HARD



52.6% of ALICE households work full-time  
38.8% are retired or not in the workforce  
8.6% are unemployed or work part-time

### ALICE BARELY MAKES ENDS MEET



**The Household Survival Budget** reflects the bare minimum that a household needs to live and work today. Locally, that averages out to \$27,528/year for a single adult, \$72,312/year for a family of four with young children, and \$30,000/year for a single senior. It does not include savings for emergencies or future goals like college. These typical household costs are well above the Federal Poverty Level of \$12,490 for a single adult and \$25,750 for a family of four.

# MEET THE BOARD

## Executive Committee

**Alexis Tibbetts**, *Chair*  
Walton County School District

**Betty Brassell**, *Immediate Past Chair*  
BBVA Bank

**Caralee Gibson**, *Chair Elect*  
GSC Systems

**Matthew Zasada**, *Treasurer*  
Carr, Riggs, and Ingram

**Kim Cox**, *Campaign Chair*  
Beach Community Bank

**Valerie Manley**, *Community Impact Chair*  
BBVA Bank

**Jessica Atkinson**, *Women United Chair*  
Raymond James Financial

**Kelly Jasen**, *Secretary*  
United Way Emerald Coast

**Jacob Foreman**  
Coldwell Banker

**Jason Fulgham**  
Okaloosa County Sheriff's Office

**Alan Giese**  
White-Wilson Medical Center

**John Hofstad**  
Okaloosa County

**Jeff Hooton**  
Synovus

**Charlie Kessler**  
Publix Super Markets

**Gordon King**  
Okaloosa Gas District

**Robert Kirila**  
Doolittle Institute

**Bernard Johnson**  
Gulf Power Company

**Patricia Parker**  
Trustmark Bank

**Athena Riley**  
Cotton & Gates

**Nathan Sparks**  
Okaloosa Economic Development Council

**Paul Swan**  
Nationwide (Retired)

**Aaron Webber**  
RDF Associates

**Randy White**  
Northwest Florida State College

**Alan Wood**  
CCB Community Bank

## Directors

**Matthew Avery**  
CHELCO

**Steve Baxter**  
Steve Baxter Insurance Agency

**Melinda Bowers**  
University of West Florida

**Marshall Buscemi**  
Publix Super Markets

**Lennie Coughlin**  
Enterprise Holdings

**Mike Coupe**  
Cox Communications



# 2019

## BECOMING UNITED WAY EMERALD COAST



In July, we officially changed our name from United Way of Okaloosa & Walton Counties to United Way Emerald Coast.

## CRAM THE VAN



In July, through our partnership with 23 local schools and nonprofits, we held our annual Cram the Van school supply drive to ensure every child started the school year with the tools needed to be successful.

## DAYS OF CARING



In September, we were joined by 841 individuals from 69 companies who spent 3,600 collective hours serving our local community.

## READINGPALS LAUNCH



In October, we launched the ReadingPals program, pairing 34 volunteers with students in local schools to build early literacy skills and social-emotional development.

## WELCOME KELLY JASEN



In November, we were excited to welcome Kelly Jasen as United Way Emerald Coast's new President & CEO.

## COATS FOR KIDS



In December, we kept the children of our community warm by collecting and distributing 993 coats through our annual Coats for Kids drive.

# 2020

## PARTNER AGENCY CERTIFICATION

In January, we certified 36 local nonprofit organizations as Partner Agencies for 2020-21.



## LAUNCH OF COVID-19 RELIEF FUND

In March, we launched our COVID-19 Relief Fund to respond to the emergent needs of our community. Altogether we raised \$318,888 thanks to our corporate sponsors and individual donors.



## COVID-19 RELIEF PHASE 1 GRANTS AWARDED

In April, we awarded the first phase of our Covid-19 Relief Fund grants to aid 6 local agencies responding to the needs of our community during the pandemic.



## COVID-19 RELIEF PHASE 2 GRANTS AWARDED

In May, we awarded the second phase of our Covid-19 Relief Fund grants to aid 7 local agencies responding to the needs of our community during the pandemic.



## UWEC'S FIRST FOOD DISTRIBUTION EVENT

In May, we also organized our first food distribution event to address food insecurity during the COVID-19 pandemic. Altogether we gave away 78,000 lbs. of food at distributions in Okaloosa & Walton counties.



## COVID-19 RELIEF PHASE 3 GRANTS AWARDED

In June, we awarded the third phase of our Covid-19 Relief Fund grants to aid 15 local agencies responding to the needs of our community during the pandemic.

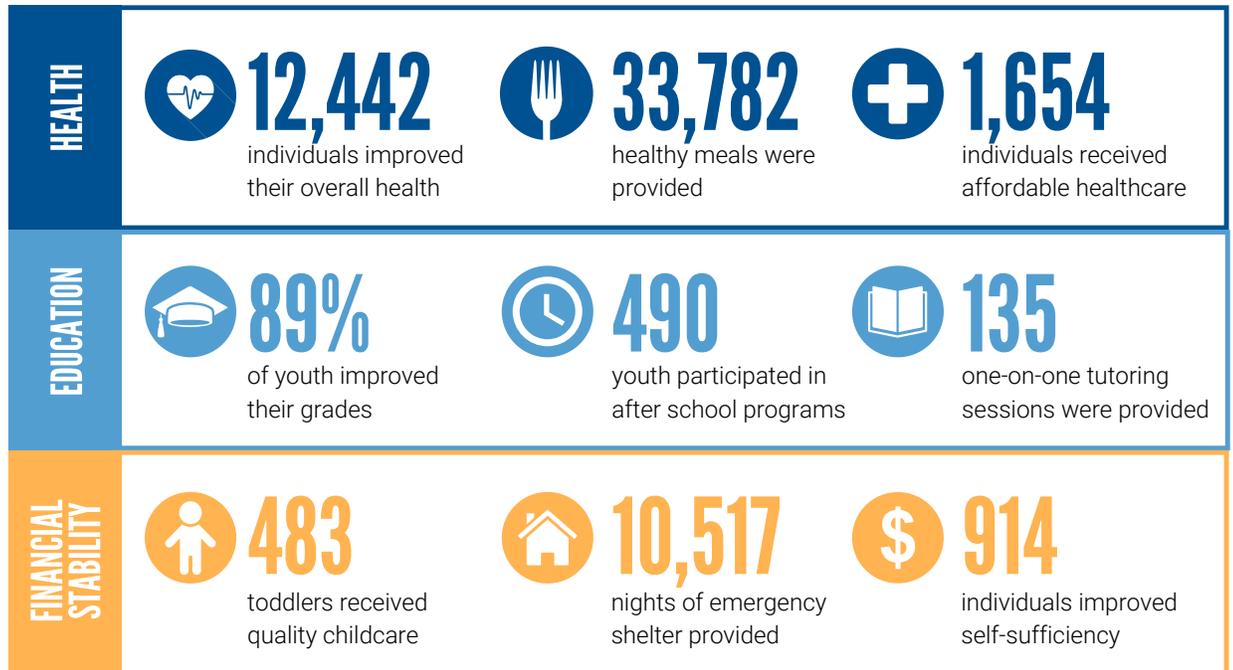


# COMMUNITY IMPACT

## WE BELIEVE THAT THERE'S MORE THAN ONE RIGHT WAY TO TACKLE THE CHALLENGES WE FACE.

It takes all of us working collectively, in all kinds of different ways, to get the job done. That's why we identify the needs of our community and invest in local programs that meet those needs through our Community Investment Grants. In 2019-2020 we awarded \$429,402 to 16 impactful nonprofit programs addressing health, education and financial stability in Okaloosa and Walton counties.

### THE RESULTS:

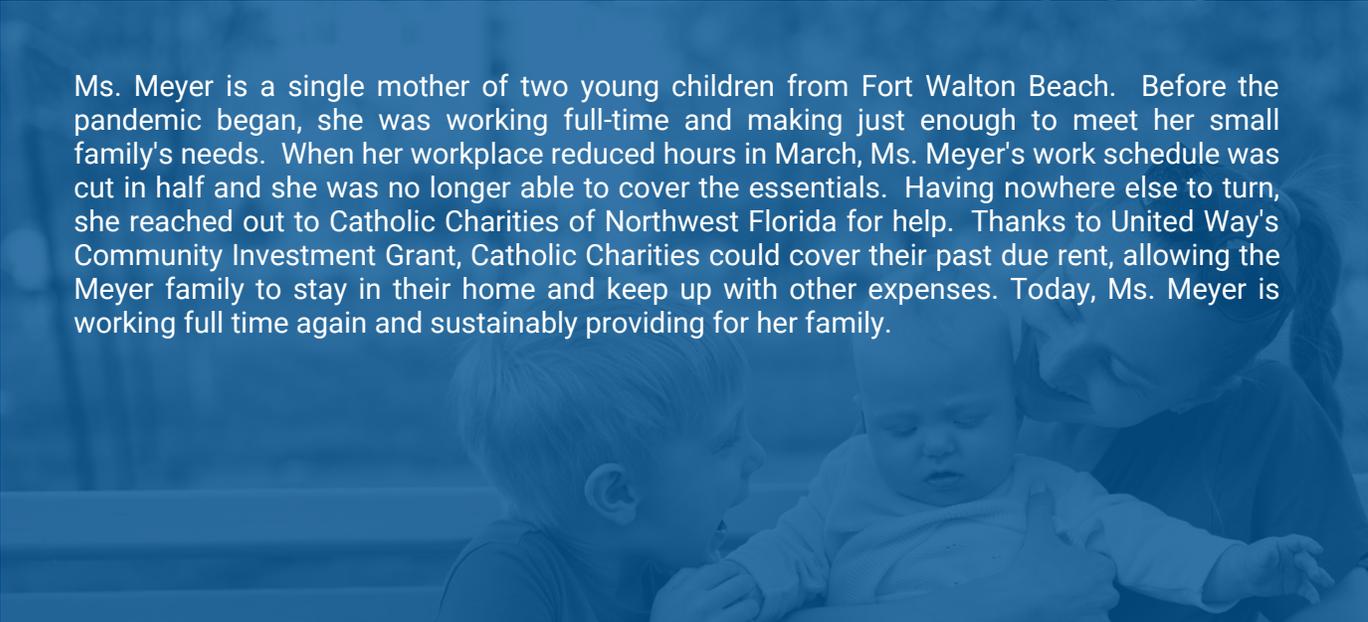


### PROGRAMS FUNDED THROUGH COMMUNITY INVESTMENT GRANTS:

**Catholic Charities of Northwest Florida** Emergency Assistance and Caring Coach | **Crossroads Center Inc.** Primary Medical Care and Dental Clinics | **Early Learning Coalition of Okaloosa and Walton Counties** Affordable Child Care | **Eleanor J. Johnson Youth Center** Block Builders and Hurt Hunger Food Program | **Fresh Start for Children and Families Inc.** Family Impact & Education | **Horizons of Okaloosa County Inc.** Operation Transportation | **Mental Health Association of Okaloosa and Walton Counties Inc.** Psychiatric Medication Assistance Program and Student Brain Health Initiative | **Northwest Florida Guardian Ad Litem Foundation** Volunteer Advocates | **Okaloosa County Council on Aging** Meals on Wheels | **Opportunity Place Inc.** Emergency Shelter and Services | **Sharing-Caring Inc.** Prescription Assistance and Emergency Shelter Programs

## THE MEYER FAMILY'S STORY

Ms. Meyer is a single mother of two young children from Fort Walton Beach. Before the pandemic began, she was working full-time and making just enough to meet her small family's needs. When her workplace reduced hours in March, Ms. Meyer's work schedule was cut in half and she was no longer able to cover the essentials. Having nowhere else to turn, she reached out to Catholic Charities of Northwest Florida for help. Thanks to United Way's Community Investment Grant, Catholic Charities could cover their past due rent, allowing the Meyer family to stay in their home and keep up with other expenses. Today, Ms. Meyer is working full time again and sustainably providing for her family.



# FINANCIAL REPORT

## Assets

Cash & Cash Equivalents	\$671,538
Cash - Restricted	\$126,274
Certificates of Deposit	\$263,057
Campaign Pledges Receivable, Net	\$291,545
Property & Equipment, Net	\$138,449
<b>Total Assets</b>	<b>\$1,490,863</b>

## Liabilities & Net Assets

### Liabilities

Accounts Payable	\$3,829
Grants Payable	\$400,000
Refundable Advances	\$130,962
Donor Designations	\$95,568
<b>Total Liabilities</b>	<b>\$630,359</b>

### Net Assets

Unrestricted	\$70,009
Temporarily Restricted	\$790,495
<b>Total Net Assets</b>	<b>\$860,504</b>

**Total Liabilities & Net Assets** **\$1,490,863**

	Without Donor Restrictions	With Donor Restrictions	Totals
<b>Campaign Revenues</b>			
Gross Campaign Contributions	\$41,062	\$1,031,751	\$1,072,813
Less Donor Designations	-	(\$95,568)	(\$95,568)
Less Allowances for Uncollectable Pledges	-	(\$200,000)	(\$200,000)
<b>Total Net Campaign Contributions</b>	<b>\$41,062</b>	<b>\$736,183</b>	<b>\$777,245</b>
<b>Other Support</b>			
Special Events	\$15,567	-	\$15,567
Grants & Other Contributions	\$348,736	\$38,109	\$386,845
Bad Debt Recovery	\$30,027	-	\$30,027
Interest & Miscellaneous	\$9,393	-	\$9,393
Rental Income	\$5,750	-	\$5,750
<b>Total Other Support</b>	<b>\$409,473</b>	<b>\$38,109</b>	<b>\$447,582</b>
<b>Net Assets Released from Restrictions</b>	<b>\$754,808</b>	<b>(\$754,808)</b>	<b>-</b>
<b>Total Campaign Revenues, Other Support, and Net Assets Released from Restrictions</b>	<b>\$1,205,343</b>	<b>\$19,484</b>	<b>\$1,224,827</b>

## Allocations & Other Functional Expenses

### Program Services

Awards & Distributions to Agencies	\$449,754	-	\$449,754
Less Donor Designations	(\$156,181)	-	(\$156,181)
Other Program Services	\$540,273	-	\$540,273
<b>Total Program Services</b>	<b>\$833,846</b>	<b>-</b>	<b>\$833,846</b>

### Supporting Services

Management & General	\$60,920	-	\$60,920
Fundraising	\$115,191	-	\$115,191
<b>Total Support Services</b>	<b>\$176,111</b>	<b>-</b>	<b>\$176,111</b>

### Total Allocations & Other Functional Expenses

**\$1,009,957** **-** **\$1,009,957**

<b>Change in Net Assets</b>	<b>\$195,386</b>	<b>\$19,484</b>	<b>\$214,870</b>
NET ASSETS AT BEGINNING OF YEAR	(\$125,377)	\$771,011	\$645,634
NET ASSETS AT END OF YEAR	\$70,009	\$790,495	\$860,504

