In 2014, United Way Suncoast adopted a 5-year strategic plan to break the cycle of generational poverty through educational strategies that give children the skills to succeed and help adults achieve financial stability.

Why? Because under-educated children in poverty are nearly three times more likely to drop out of school and repeat the cycle of poverty than their middle income peers.

**2017 PROGRESS REPORT**

United Way Suncoast: Breaking The Cycle of Generational Poverty

Ensure that children are surpassing key readiness and early grade reading benchmarks.

<table>
<thead>
<tr>
<th>GOALS</th>
<th>2020 COMMUNITY TARGET</th>
<th>2017 COMMUNITY STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EARLY LITERACY</strong> Ages 0-12</td>
<td>Improve regional 3rd grade reading scores to 65%</td>
<td>3rd grade reading scores 56.4%</td>
</tr>
</tbody>
</table>

**United Way Suncoast fights for everyone through educational programs for children; building financial strength and skills for adults; volunteer activation and support in a crisis.**

**UNITED WAY FIGHTS FOR THE EDUCATION AND FINANCIAL STABILITY OF EVERY PERSON IN OUR COMMUNITY.**

**LIVE UNITED®**

**FINANCIAL STABILITY** Ages 18+

Ensure adults achieve long-term financial stability by developing the skills and opportunities to obtain and sustain employment.

<table>
<thead>
<tr>
<th>GOALS</th>
<th>2020 COMMUNITY TARGET</th>
<th>2017 COMMUNITY STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINANCIAL STABILITY</strong> Ages 18+</td>
<td>Increase the regional number of individuals/families living at 200% of poverty or better to 65%</td>
<td>Number of individuals/families living at 200% of poverty or better at 67.6%</td>
</tr>
</tbody>
</table>

**YOUTH SUCCESS** Ages 13-18

Ensure that children are graduating from high school with the skills necessary to pursue post-secondary education or vocational training.

<table>
<thead>
<tr>
<th>GOALS</th>
<th>2020 COMMUNITY TARGET</th>
<th>2017 COMMUNITY STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>YOUTH SUCCESS</strong> Ages 13-18</td>
<td>Improve high school graduation rates to 90%</td>
<td>High school graduation rates 82.8%</td>
</tr>
</tbody>
</table>

**SUPPORT SERVICES**

**NEIGHBORHOOD RESOURCE CENTERS**

**MISSION UNITED™**

**VOLUNTEER ACTIVATION**
Gina was working full-time to support herself and her son – and living in transitional housing due to a devastating crisis in her personal life. While there, she was introduced to the financial coaching program offered by United Way Suncoast. Soon after enrolling, Gina received a letter from the IRS notifying her that she owed – a lot. Scared and not sure what to do, she turned to United Way's Volunteer Income Tax Assistance (VITA) program.

VITA volunteers, along with United Way Suncoast employees, spent hours with Gina and the IRS. Together, they were able to pay the monies owed, bring Gina up-to-date on her taxes AND get her a refund…which she used to start a savings account.

Through the VITA and financial coaching programs, Gina found the help she needed to overcome her tax issues and build a more financially stable future.

Sara was looking for a way to give back that fit her work schedule. Diago is a typical 6-year old boy who loves Pokemon and playing soccer. Sara loves to read. Diago? Well, reading wasn’t one of his favorite things. That is until he joined the United Way Suncoast ReadingPals program at his elementary school and was partnered with Sara.

In their time together, Sara has seen an amazing transformation. As she says, "The biggest change in Diago has been his confidence. Now he’s excited to take home a chapter book and can’t wait to read it. I’m so proud of how much he loves to read!"

ReadingPals program provides positive reinforcement and personal attention to children while helping them improve their reading skills and develop a lifelong love of reading.

Kim proved to be unstoppable, with some help from United Way’s Resource Center.

While building her salon business, Kim spent hours at the United Way Suncoast Resource Center, working with staff to help spread the word. When she was suddenly faced with a legal battle, Kim turned to those same people, connecting with the team from United Way Suncoast and partner Bay Area Legal Services.

Today, her victory in court carries over to her salon, where Kim continues to follow her passion. With help from United Way Suncoast, Kim was able to keep her salon open, her clients happy and give back to the community that helped her.

United Way Suncoast ReadingPals program brought Sara and Diago together.

Sara was looking for a way to give back that fit her work schedule. Diago is a typical 6-year old boy who loves Pokemon and playing soccer. Sara loves to read. Diago? Well, reading wasn’t one of his favorite things. That is until he joined the United Way Suncoast ReadingPals program at his elementary school and was partnered with Sara.

In their time together, Sara has seen an amazing transformation. As she says, "The biggest change in Diago has been his confidence. Now he’s excited to take home a chapter book and can’t wait to read it. I’m so proud of how much he loves to read!"

ReadingPals program provides positive reinforcement and personal attention to children while helping them improve their reading skills and develop a lifelong love of reading.
GREAT THINGS HAPPEN WHEN WE LIVE UNITED.
It’s a United Way credo and you’re a shining example of the incredible impact individuals and teams can have when working together. Without your leadership, our community would not be the same.

OUR IMPACT ON EARLY LITERACY

138,417
LOCAL CHILDREN

local children received support from United Way to improve their educational opportunities in Desoto, Hillsborough, Manatee, Pinellas, and Sarasota counties.

86%
CHILDREN

of 2,892 children did not suffer summer learning loss due to access to educational programming over the summer.

OUR IMPACT ON YOUTH SUCCESS

100%
HIGH SCHOOL STUDENTS

of dual enrollment students in Operation Graduate, a program for at-risk high school students, graduated on time and 90% were accepted into higher education or military service.

84%
PARENTS

parents reported an increase in knowledge on how to better support their children’s academic career after attending a Parent University event.
OUR IMPACT ON FINANCIAL STABILITY

14,192 ADULTS

adults were provided pre-employment services and financial education support to help move forward on the path to financial stability.

85% ADULTS

of adults who took a certification or licensing program received or made strong growth toward this license, increasing the financial stability of their household.

19,921 TAX RETURNS

tax returns were prepared by United Way’s VITA partnership, with United Way-specific sites preparing 11,069 returns. Using over 300 trained volunteers, taxpayers saved over $25 million in both savings from tax preparation fees and refunds that were given back to the community which helped pay debt, secure safe housing, and more.

OUR IMPACT ON VOLUNTEERISM

49,665* VOLUNTEER HOURS

organized through United Way HandsOn Suncoast delivered $1,198,913 in value back to the community.

*2017 volunteer hours
SUNCOAST REGION TOP 100 MOST GENEROUS WORKPLACES

1. Publix Super Markets
2. Raymond James Financial
3. Duke Energy
4. USAA
5. The Mosaic Company
6. Enterprise Leasing Corporation, LLC
7. Wells Fargo
8. Tech Data Corporation
9. Macy’s
10. Citi
11. City of Tampa
12. United Parcel Service
13. Ferman Motor Car Company, Inc.
14. Hillsborough County
15. Florida Blue
16. EY
17. Deloitte
18. Regions Bank
19. SunTrust Bank
20. Target Stores
21. Hillsborough County Aviation Authority
22. PAR, Inc.
23. Bank of America
24. BayCare Health System
25. Tampa Bay Rays
26. Transamerica
27. FCCI Insurance Group
28. Moffitt Cancer Center
29. Fifth Third Bank
30. Carlton Fields
31. TCS
32. The Bank of Tampa
33. School Board of Sarasota County
34. TECO Energy
35. City of Clearwater
36. City of St. Petersburg
37. MetLife
38. PwC
39. Cox Target Media / Valpak
40. United Way Suncoast
41. T. Rowe Price, Inc.
42. Ceridian
43. Hill Ward Henderson
44. Gerdau
45. Zachry Group
46. Tampa Bay Times
47. Sarasota Memorial Health Care System
48. PNC Bank
49. AAA – The Auto Club Group
50. Holland & Knight LLP
51. Quala
52. FedEx
53. AT&T Global Network Services
54. Hillsborough County Public Schools
55. Tampa Bay Trane
56. TD Bank
57. Costco
58. Signature Flight Support
59. Travelers
60. General Electric
61. Johnson & Johnson
62. Lockheed Martin RMS
63. CAE USA Inc.
64. Intel Corporation
65. Cushman & Wakefield of Florida
66. Team Fishel
67. Northern Trust - Sarasota
68. Nationwide Insurance/ Claims
69. Stadium Toyota
70. PNC Foundation
71. Electric Supply, Inc.
72. Trenam Law
73. ConMed
74. Humana
75. Florida Power & Light Company
76. USAmiBank
77. Hercules Sealing Products
78. Sarasota Board of County Commissioners
79. City of Plant City
80. Suncoast Credit Union
81. KPMG LLP
82. Brown & Brown
83. Raytheon
84. Universal Insurance Holding of N.A.
85. Walmart
86. IBM Global Services
87. Principal Financial
88. IBERIABANK
89. Delta Air Lines, Inc.
90. BB&T
91. Herald-Tribune Media Group
92. Charter Spectrum Services
93. I HeartMedia, Inc.
94. Eli Lilly Company
95. City of Sarasota
96. Dillard’s
97. Spectra Energy Corp.
98. PCL Civil Constructors, Inc.
99. Pinellas County Schools
100. First Housing
Each of these workplaces strive to create a culture of caring that includes supporting a company-wide annual workplace campaign enabling employees to donate through simple payroll deductions.

These workplace campaigns require an investment of time and resources by the leadership of these organizations to plan and organize information sessions and special-themed events—all done in the spirit of working together to make a difference.

In addition to financial investments, many of these workplaces encourage staff to volunteer on a regular basis.
INVESTOR BENEFITS
BUILDING A CULTURE OF PHILANTHROPY IS GOOD BUSINESS.
Choose United Way Suncoast to help develop your best and brightest talent, while creating added engagement and loyalty with your employee base.

**Alexis de Tocqueville Society**
Tocqueville Society members are community champions who contribute $10,000 to $10,000,000 annually to United Way. Members network with area business leaders and philanthropists by attending exclusive year-round events.

**Loaned Executive Program**
Intensive 13-week immersive leadership development for high-potential staff. Loaned employee works directly with United Way to gain experience in project management, communication, public speaking, professional networking and relationship building, and corporate social responsibility impact.

**Internal Campaign Chair and Committee**
Challenge high-potential employees to show their business acumen by planning and executing the organizational campaign. United Way staff provides mentorship during the campaign and shares insight on the team’s performance. Participants build experience in planning and implementing a marketing campaign, organizing resources, budgeting, leading others, communication and public speaking.

**Volunteer Opportunities**
Promote team building, build communication, and break through silos with organized volunteer events for workgroups, departments or organization-wide. Challenge high-potential staff to organize your next volunteer event through United Way HandsOn Suncoast.

**Women United®**
Women United brings together women of all ages in the spirit of philanthropy and service. As an integral part of United Way, Women United® fights for the education and financial stability of every person in every community. They are like-minded women who contribute their personal passions, inspired ideas, and unique strengths to the mission.

**Young Leaders’ Society**
Young Leaders’ Society is for professionals 40 years old and under who are passionate about community involvement. Our members bring more than youth and professional stature: they are leaders with a vision for their future and our community.
**ENGAGE YOUR TEAM**

United way Suncoast can be part of your corporate social responsibility plan. We offer a variety of engagement and professional development programs for your team.

- Day of Caring Volunteer Activity (October)
- Workplace Lunch N Learns
- United Way Suncoast Impact Reports and Stories
- Donors invited to United Way Leadership and/or Affinity Groups
  - Women United
  - Young Leaders' Society
- Art of Giving
- Custom Volunteer Activities
- Sports Team Ticket Events
- Alexis de Tocqueville Society
- Loaned Executive Program
- Volunteer Board or Committee Membership

**CREATE ORGANIZATIONAL IMPACT YEAR-ROUND**

A TRUSTED PARTNER IN CORPORATE SOCIAL RESPONSIBILITY*

<table>
<thead>
<tr>
<th>IMPACT ON CLIENTS</th>
<th>IMPACT ON EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>93%</strong> WILL BE MORE LOYAL to CSR driven companies</td>
<td><strong>80%</strong> Job seekers PREFER TO WORK for CSR driven companies</td>
</tr>
<tr>
<td><strong>87%</strong> PREFER BUYING PRODUCTS/SERVICES from CSR driven companies</td>
<td><strong>40%</strong> Employees in CSR driven companies HAVE BETTER MORALE than non-CSR driven companies</td>
</tr>
<tr>
<td><strong>60%</strong> WILL PAY 60% MORE to CSR driven companies</td>
<td></td>
</tr>
</tbody>
</table>

*Source: www.pi-slice.com
At United Way Suncoast, we believe it is our duty to express our appreciation to each individual who makes a gift and share the invitation to connect through volunteerism, event participation and advocacy. In fact, the number one request we receive from donors is to stay connected with them throughout the year (not just at campaign time) with information on impact and opportunities to get involved.

**WHEN WE RECEIVE DONOR DETAILS, WE ARE ABLE TO:**

- Personally thank them and show our appreciation for their investment
- Communicate via digital channels to update them on the impact of their investments throughout the community
- Mail tax receipt*
- Share opportunities to participate in a variety of fun engagement activities throughout the year
- Send invitations to exclusive United Way events (including affinity groups, sporting events, family activities and more)

*When home mailing address is shared.
United Way Suncoast, Inc.  
June 30, 2017

Statement of Financial Position

<table>
<thead>
<tr>
<th>Assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Cash Equivalents</td>
<td>$3,824,999</td>
</tr>
<tr>
<td>Pledges Receivable, Net of Allowance for Uncollectible Pledges</td>
<td>6,241,957</td>
</tr>
<tr>
<td>Other Receivables</td>
<td>151,948</td>
</tr>
<tr>
<td>Prepaid Expenses and Other Assets</td>
<td>141,398</td>
</tr>
<tr>
<td>Investments</td>
<td>23,965,639</td>
</tr>
<tr>
<td>Accrued Bequests</td>
<td>468,379</td>
</tr>
<tr>
<td>Property &amp; Equipment, Net</td>
<td>592,314</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$35,386,634</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities &amp; Net Assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocations &amp; Designations Payable</td>
<td>$5,337,403</td>
</tr>
<tr>
<td>Other Liabilities</td>
<td>1,115,726</td>
</tr>
<tr>
<td>Annuities Payable</td>
<td>282,076</td>
</tr>
<tr>
<td>Obligations under Remainder Trust Agreement</td>
<td>90,560</td>
</tr>
<tr>
<td>Deferred Lease Incentive</td>
<td>135,798</td>
</tr>
<tr>
<td>Capital Lease Obligations</td>
<td>67,379</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>7,028,942</strong></td>
</tr>
<tr>
<td>Unrestricted Net Assets</td>
<td>17,545,607</td>
</tr>
<tr>
<td>Temporarily Restricted Net Assets</td>
<td>6,754,028</td>
</tr>
<tr>
<td>Permanently Restricted Net Assets</td>
<td>4,058,057</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>28,357,692</strong></td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td><strong>$35,386,634</strong></td>
</tr>
</tbody>
</table>

Statement of Activities

**Public Support and Revenue**

| Gross Campaign Results                     | $20,325,689 |
| Donor Designations                         | (2,881,280) |
| Provision for Uncollectibles               | (1,236,146) |
| Net Annual Campaign                        | 16,208,263 |
| Bequests/Gift Annuities/Contributions      | 50,726 |
| Program Revenues                           | 1,385,879 |
| Service Fee Income                         | 226,840 |
| Investment Return                          | 2,180,200 |
| Other Income                               | 295,846 |
| **Total Public Support and Revenue**       | **$20,347,754** |

**Expenses**

| Gross Funds Awarded/Distributed            | 12,933,110 |
| Less Donor Designations                    | (2,881,280) |
| Net Program Funding                       | 10,051,830 |
| Other Program Costs                       | 3,713,014 |
| **Total Program Services**                | **13,764,844** |
| Resource Development                      | 1,620,672 |
| Organizational Administration             | 2,160,221 |
| **Total Support Services**                | **3,780,893** |
| **Total Expenses**                        | **17,545,737** |
| Other Nonoperating Revenue & Expenses      | (115,220) |
| **Increase in Net Assets**                | **2,686,797** |
| Net Assets at the Beginning of the Year   | 25,670,895 |
| Net Assets at the End of the Year         | **$28,357,692** |

United Way adheres to best practices in non-profit policies and procedures, applying consistent, effective, internal controls and strong corporate governance to ensure accountability and transparency.