OUR MISSION: 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.

OUR VISION: 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.
Message from our 2017 Board Chair...

Grateful. That was my word for 2017. I like to choose one word that will keep me focused on the positive things of life. Grateful represents everything we have been blessed with and gives us a thankful heart that should overflow to those around us. When we are Grateful we actually see the needs of others and we strive to make lives better, providing support to the needy in our community.

I am so Grateful for the United Way and for those of you who partnered with us this campaign year. We made changes to our funding mission in 2017 and those changes will bring us closer to the needs of the community and will provide a greater impact than ever before. Thank you for understanding and supporting those changes as we communicated them to all our United Way partners. Our Campaign Chair, Alexis Tibbetts, our Board of Directors and United Way staff did a fantastic job sharing the vision and message of the United Way to businesses and individuals who are committed to our mission of hope.

Celebrating 60 years is an amazing feat in itself, but when you really think back on all the assistance that has been given out during that time frame you can’t help but be excited about the United Way. There have been good times and I’m sure) struggles during those 60 years but I know we have been able to change lives and the cycle of despair and for that, I am Grateful. It has been an amazing year and I can’t wait to see the impact we have in our community over the next 60 years. Thank you for letting me serve you!

Message from our President and CEO...

DEAR COMMUNITY LEADERS, VOLUNTEERS, AND DONORS,
Thank you for the tremendous support and partnership this past year, our sixtieth year as a local United Way! I am proud of the tireless work that you have put forth, along with our United Way staff and Board, in 2017, and recognize that our success is directly related to these efforts. And success is certainly the correct word to associate with our accomplishments since the last time I lent my words to our annual report.

In 2017, we began executing our Community Impact model, reaching out to leaders, professionals, and concerned citizens to discuss the most-pressing problems facing our community. These problems were refined into measurable goals that aim to show you how well the resources invested in the United Way are making a difference. This effort is not easy—nothing as meaningful as what we are doing for our community ever is. We remain undeterred by the challenges and are committed to the cause! As we enter our first programmatic grant cycle this year, we stand ready to align ourselves and the resources under management to meet the incredible needs in Okaloosa and Walton Counties.

By the end of 2018, you will see the results of our efforts to serve the health and human service needs in Okaloosa and Walton Counties, and I look forward to sharing the measurable results with you next year. As I close, I once again express my heartfelt thanks to our donors, volunteers, and advocates who made 2017, our 60th year as a United Way organization, a success. My thanks also extends to the many community groups, faith-based and civic organizations, educational advocates, and individual volunteers in our community. We stand together to make our community better. We will secure a United win when we work together in this United fight, ensuring all of us the opportunity to LIVE UNITED.
Anthony Whittington
Patrick & Mahal Joyce
James & Margaret
Rick Owen
Gordon King
Donald Bierman
Kristen Alexander
10 Anonymous
$2,000 +
GOLD
foundation of our country.
to United Way with the same commitment to contribute an annual gift of $10,000 or more.
Society is composed of philanthropists who make the difference.
High School
Carr, Riggs & Ingram
United Way

goals of Okaloosa and Walton Counties and effort toward its advancement. United Way of Okaloosa & Walton Counties Tocqueville Society is composed of philanthropists who contribute an annual gift of $10,000 or more to United Way with the same commitment to improving our community that has built the foundation of our country.

THE RED FEATHER SOCIETY

Alain Gieseman
Paul Swan

BRONZE
$1,000-$1,499
16 Anonymous
Mario Aponte-Rios
Kelli Annett
Andrew Ayres
Lyndal Bardin
Susan Breeding
Melinda Bowers
Louise Clark
Leonard Coughlin
Barbara Covington
Jarod Cutright
Jim Cypret
Natalie Dief
Judy Durham
Alexis Evans
Kory Florence
Jesus Flores
Tabby Fournier
Diane Fraser
Carly Gambrell
Michelle Goss
Randall Grimmette
Ken Hair
Tiffany Hages
David Hathcox
Brent Haywood
Nancy Henson
Jeffrey Hernandez
Kayla Hildebrandt
Paula Hilton
Cindy Holmes
Adam Jackson
Bernard H. Johnson, Jr.
Keith Jowers
Robert Komm
Michael Lindhorst
James Lueken
Nick Muir
Nathan Nichol
Michael Oleksuk
Gerald Palliser
Thomas Peters
Molly Peterson
Paul Rhein
Margie Sanders
Samuel Scallan
Don Scruggs
Mark Serafin
Ben Skinner
Sam Smith
Stacy Stephenson
Mike Sterner
Tina Stevenson
Erica Thomas
Alexis Tibbetts
Donald Tomlinson
Susan Van Buren
Judith Walts
Susan Wilkinson
Lisa M. Williams
Jonna Wilson
Steve Wolfroom

PATRON
$750-$999
8 Anonymous
Clark Barefield III
Bruce Bernstien
Jeanne Dailey
Terri Duplantis
Cheryl Duty
Don Edwards
Bragg Farmer
Carolyn Foley
Rachel Gillis
Tommie Gipsom
Lyvonica Green
Debra Haan
Darren Hemingway
Rochelle Kimball
Brian O’Neal
Everett Ratliff III
Lee Reinsmith
Dennis Samac
Donald Schnieder
Jesse Senn
Darrel G. Shatterly

OUTGOING MEMBERS
United Way of Okaloosa & Walton Counties expresses its heartfelt appreciation to the outgoing members of the 2017 Board of Directors for their dedicated service and loyalty to United Way’s mission. Thank you for “making a difference”.

Michael Beedle - City of Ft Walton Beach
Yvonne Freeman - Sacred Heart Foundation
Lee Lewis - Avon, Inc

Mitch Mongell, Ft Walton Beach Medical Center
Steve Moore, Ft Walton Beach Medical Center
Charlie Nix, Okaloosa Sheriff’s Office
Sal Nodosiani, Matrix Design Group
Patricia Parker, Trustmark
Christine Powell, Sacred Heart Hospital, EC
Artie Rodriguez, Walton County Tax Collector’s Office
Henry Sanders, Boeing Co
Steve Moore, Ft Walton Beach Medical Center
Katie Sharon, Okaloosa County Clerk of Courts Office
George Shealy, The Rock Ministries of Ft Walton
Nathan Sparks, Okaloosa Economic Development Council
Paul Swan, Nationwide, Retired

WELCOME to our new 2018 Board Members!

Jared Davis • Pubs, Crestview North
Gordon King • Okaloosa Gas District
Jennifer Kraus • Bit-Wizards
Valerie Manley • BBVA Compass
Aaron Webber • RDP Associates
Matthew Zasada • Carr, Riggs and Ingram

SECOND TERM NOMINEES
Matthew Avery • Katie Sharon
Kim Cox

ON THE RED FEATHER SOCIETY

Tocqueville was a French philosopher and philanthropist who traveled America in 1831. His journals record his thoughts on democracy and his observations about the remarkable commitment Americans make to the improvement of their communities. The name Tocqueville Society was chosen in honor of his admiration for the spirit of voluntary association and effort toward its advancement. United Way of Okaloosa & Walton Counties Tocqueville Society is composed of philanthropists who contribute an annual gift of $10,000 or more to United Way with the same commitment to improving our community that has built the foundation of our country.

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Paul Swan

GOLD
$2,000 +
10 Anonymous
Kristen Alexander
Donald Bierman
Michael Guidry
Gordon King
Rick Owen
James & Margaret Phillips
Patrick & Mahal Joyce Sullivan
Anthony Whittington

SILVER
$1,500-$1,999
4 Anonymous
Michael Beedle
Shelton Carroll
Traci Kisielowski
James & Deborah MacDonnell
Phillip & Gail Miceli
Jamie Nichols
Byle Schroader
Marshall Springle
Meredith Teifer
Tyler Watkins
Hank Woolard

EXECUTIVE MEMBERS
Kim Cox, Fund Distribution Chair
Beach Community Bank
Yvonne Freeman, Marketing Chair
Sacred Heart Foundation

BOARD
Jessica Davenport Atkinson, Raymond James

OFICERS
Betty Brassel, Chair
First City Bank
Walter Hooks, Past Chair
Regions Bank
Alan Wood, Chair-Elect
CCE Community Bank
Alexis Tibbetts, Campaign Chair
Walton County High School
Alan Jowers, Treasurer / Finance Chair
Carr, Riggs & Ingram
Rick Owen, Secretary
United Way

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2017 - 2018 BOARD OF DIRECTORS

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Gordon King • Okaloosa Gas District
Jennifer Kraus • Bit-Wizards
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UNITED WAY of Okaloosa & Walton Counties
2017 - 2018 BOARD OF DIRECTORS

LIVE UNITED
60 YEARS OF MAKING LIFE BETTER FOR ALL!

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The Marketing Committee ensures that our community understands the United Way of Okaloosa & Walton Counties and is familiar with our family of agencies. Volunteers develop ideas to support the annual fundraising campaign including the theme, brochure, video, billboards, radio and TV public service announcements. They coordinate the Day of Caring, the official campaign kick-off event plus other special events.

Caralee Gibson
Kaitlyn Durcharme
Jessica Atkinson
advocates for the Workplace Giving Campaign.

Marketing Board Chair - Yvonne Freeman - Brainstorms Marketing & Event Planning

Bernard Johnson - Gulf Power Co
Kathy Morrow - 2Morrow Communications
Kathy Newsby - Okaloosa Health Dept
Michele Nicholson - Okaloosa Sheriff’s Office
Jan Orr - Gulf Power Co
Christin Powell - Sacred Heart Hospital of EC
Kristine Schwartz - 3OA
Lynn Stegner - Publix
Gail Walter - Edward Jones Investments
Bonnie Whitted - CHELCO

MARKETING COMMITTEE

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United Way Volunteers

2017 LOANED EXECUTIVES

Serving as a Loaned Executive is a unique experience and professional development opportunity. By supporting United Way, an employer’s corporate social responsibility is emphasized, and relationships with major partners are strengthened. Loaned Executives make a real impact right here in our community and serve as primary advocates for the Workplace Giving Campaign.

Drew Ayres, Gulf Power Co
Nicole Brewer, Safe Connections
Cynthia Brown, Florida Crimson Living Women’s Home
Pat Carlson, Gulf Power
Shawn Daugherty, The Boxing Company
Lauren Donaldson, Okaloosa County W&S
Kaitlyn Dacharme, Beach Community Bank
Diane Fraser, Emerald Coast Science Center
Jason Fulghum, Okaloosa Sheriff’s Office
Taylor Goode, Boys & Girls Club
Brianna Grogan, Mossy Head School

Ken Hair, Children in Crisis
Tiffany Howell, Hilton Sandestin
Tyler Jackson, CHELCO
Candace Lynch, Safe Connections
Ill Mansfield, Everly Learning Coalition
Jackie Matichuk, Okaloosa Gas District
Sally McConnell, Independence for the Blind
Tammy Miller, Smart Bank
Laura Moore, Children in Crisis
Dawn Novy, Boys and Girls Club
Shanel Paulus, Coastal Bank & Trust
Suzie Perogy, Boys & Girls Club

Kay Pierce, South Walton High
Nero Randolph, Chautauqua Health Services
Brittany Redman, Fresh Start
Bob Shykskoski, BBVA Compass
Darrell Smith, Hilton Sandestin
Whitney Temple, Twin Cities Hospital
Erie Thercher, Arc of the Emerald Coast
Pam Walters, NWSC
Adricia Williams, Early Learning Coalition
Tracy Wilson, CCB Community Bank
Eva Wise, Catholic Charities NWF

LOANED EXECUTIVE COMMITTEE

Shawn Daugherty, Bernita Everett, Jackie Matichuk, Pam Walters

Coats for Kids at Christmas - Community coat drive for children. 2017 Stats - collected and distributed over 3,000 coats for children in Okaloosa and Walton Counties. Fifteen Partner Agencies assisted in distributing coats; 90 local businesses were drop off locations; ResortQuest, a Wyndham Resort cleaned the coats; and A&A Transfer provided the boxes.

Cram the Van - Saturdays in July and August...in 2017, the Okaloosa Public School Foundation and volunteers from 24 Okaloosa District Schools collected over 5,361 pounds of school supplies during July. Nine other United Way Partner Agencies collected supplies to assist their clients or local schools.

Thanks to our sponsors: Lee Automotive Group, Cumulus Radio and Walmart.

Day of Caring - September...organized by United Way and is the largest volunteer day of service that provides individuals the opportunity to learn the needs of the community while helping nonprofits, schools & our local parks.

2017 Stats: 1,904 volunteers, from 84 businesses, completed 68 projects and donated 3,600 hours of service in Okaloosa and Walton Counties; with a total value of $8,172 in service to our community.

Familywise - A prescription assistance program which is a longtime partner of United Way, working with nearly 1,000 local United Ways dedicated to helping improve the health and well-being of individuals, families and communities. In 2016, this program helped 8,729 people in Okaloosa County save $231,378. In Walton County, 1,511 people saved $32,509.

Stamp Out Hunger Food Drive - United Way has partnered with the National Association of Letter Carriers for the past 20 years to organize the Stamp Out Hunger Food Drive. All collected food items are distributed to our Partner Agencies and local food banks. The food drive is held the second Saturday of May to help replenish our food banks. In 2017, Okaloosa and Walton Counties collected over 100,000 pounds of food and distributed to 24 local food banks.

VITA / MFT - Volunteer Income Tax Assistance. United Way partners with IRS to provide FREE tax assistance to residents with low-to-moderate income and assists eligible taxpayers in claiming any special credits and deductions. 2016 - volunteers processed 239 tax returns, kept $156,319 in our community and saved $28,680 in preparation fees.
COMMUNITY CAMPAIGN HIGHLIGHTS

• Campaign consisted of 94% workplace campaigns and 6% Corporate and Private donors.
• 3,119 donors contributed.
• Contributions from 90 donors giving $1,000 or more represent 13.9% of the campaign.
• 25 companies contributed a corporate gift representing 25% of the total.
• Thanks to Publix Corporate for contributing $214,300.00 in matching dollars for the 2017 Publix United Way Campaign.

DECEMBER 31, 2017 STATEMENT OF FINANCIAL POSITION

Assets
Cash and cash equivalents $343,264
Pledges receivable, less allowance for uncollectibles $1,031,762
Other receivables $43,715
Land, building and equipment, net of Depreciations $184,838
Total Assets $1,603,579

Liabilities
Allocations payable and donor payable $655,318
Accounts payable and accrued liabilities $45,361
Total Liabilities $700,679

Assets less cash on hand less liabilities $559,636

Problems.
The ones most people don’t have the stomach for.
The ones nobody talks about at cocktail parties.
The ones that can’t be solved.
We go looking for them.
In unforgiving cities, desolate towns, and seemingly docile suburbs.
We find every dollar we can to address them.
But we are more than the fundraisers.
We are the hand raisers.
The game changers.
The stop-talking-start-doing-band-together-and-take-on-the-impossible-task-masters.
United, we stand up
No matter the obstacles.
No matter the odds.
We surround a community’s most critical problems.
And we fight.
We fight for those who need a voice and those whose names we do not know.
United Way fights for the health, education, and financial stability of every person in every community.
Because change doesn’t happen alone.
Hope isn’t a one-man band.
And there’s no such thing as self taught or self made.
We have one life.
To live better, we must Live United.
2017/2018 Community Impact Area Goals

**TRADITIONAL MODEL vs. COMMUNITY IMPACT MODEL**

- **A Fundraising Organization** → Community Problem Solver
- **Focus on Treating Symptoms** → Treats Root Causes
- **What Do Agencies Need?** → What Does the Community Need?
- **Funds Many Worthy Causes** → Focuses on Top Priorities to Effect Lasting Change
- **Accountability by Individuals/Numbers Served** → Accountability by Measurable Results
- **Talks to Donors Once a Year** → Communicates Results and Invites Involvement Year-Round

**Health**
- Increase access to mental health and substance abuse programs
- Increase access to primary and secondary care, including dental
- Provide access to database or outreach center to coordinate care, avoid redundancy, and provide available resources
- Increase access to resources and tools to cover prescription costs

**Financial Stability**
- Increase transportation support
- Increase affordable housing
- Improve disaster readiness
- Improve tools to affordable child and elder care
- Improve access to tools to increase self-sufficiency

**Education**
- Improve school readiness
- Ensure quality providers are available, accessible, and affordable; create learning opportunities for children
- Improve the educational success of at-risk children
- Sustain stability programs addressing social, emotional, and developmental needs of children and youth

**NEW BUSINESS MODEL**

**WHO’S ALICE**

**ALICE REPORT**

**Okaloosa and Walton Counties**

- **Approximately ONE IN THREE** Okaloosa County households and
- **TWO IN FIVE** Walton County households STRUGGLE to afford basic household necessities, including housing, child care, food, transportation, and health care.

**Households by Income, 2007 to 2015**

**Population:** 198,664 | **Number of Households:** 76,721
**Median H.H. Income:** $55,659 (state average: $49,426)
**Florida Underemployment Rate for 2015:** 11.5%
**Households Below ALICE Threshold:** 25,445 (33%)  

**Population:** 59,487 | **Number of Households:** 23,490
**Median H.H. Income:** $44,966 (state average: $49,426)
**Florida Underemployment Rate for 2015:** 11.5%
**Households Below ALICE Threshold:** 9,676 (42%)  

**What does it cost to afford the basic necessities?**

The bare-minimum Household Survival Budget does not include any savings, leaving a household vulnerable to unexpected expenses. ALICE households typically earn above the Federal Poverty Level of $11,770 for a single adult and $24,250 for a family of four, but less than the Household Survival Budget.
Allocating funds to programs for United Way of Okaloosa-Walton Counties’ Partner Agencies is a very involved process. Many trained volunteers from within our community serve on the Fund Distribution Committees spending several months carefully analyzing our community’s needs, evaluating the performance and impact of agency programs and studying funding requests. Once the committee’s recommendations are approved by United Way of Okaloosa & Walton Counties’ Board of Directors, funds are distributed to programs that make the greatest impact in our community. This Fund Distribution process is key for the accountability of the United Way and of each of its Partner Agencies.

CHAIR: Kim Cox - Beach Community Bank

Sue Audi-Davis, Retired
Carol Benson, CCB Community Bank
Carol Benfield, Okaloosa Gas District
Marshall Buscemi, Publix
Cindy Carter, BBVA Compass
Adam Clause, Gulf Power
Ken Crawford, Beach Community Bank
Josh Cragin, Summit Bank
Brent Everett, First City Bank
Ken Floyd, Banyan Investment Group
Cindy Frakes, Gulf Power
Donny Fugate, CHELCO

Suzanne Gaines, Gulf Power
Judie Geato, Okaloosa Gas District
Nancy Griffin, Gulf Power
Shelley Hinojosa, Walton High School
Audrey Jacobs, Bank of America
Michelle Johnson, Trustmark National Bank
Linda Jones, Trustmark National Bank
Brooke Kenton, Trustmark National Bank
Kadie King, Carr, Riggs & Ingram
Valerie Manley, BBVA Compass
Randy McDaniel, Okaloosa County Emergency Management

Noni Newton, Twin Cities Hospital
Kelle Olsen, Okaloosa Gas District
Patricia Parker, Trustmark National Bank
Roxy Reback, Warren Averett CPAs
Matthew Rushing, CHELCO
Jonathan Stalzer, First City Bank
Al Smith, FMS Housing Authority
Karen Smotherman, The Boeing Company
Gail Waller, Edward Jones Investments
Pamela Walters, NWFSC
Judith Wiseman, Families Therapies

Impact Area: Education

Give. Advocate. Volunteer. Live United

American Red Cross: $2,797
Catholic Charities of NWFL: $10,083
Fedding the Gulf Coast: $6,731
Fresh Start for Children & Families: $18,705
Habitat for Humanity in Okaloosa County: $9,921
Habitat for Humanity in Walton County: $3,979
Harvest House: $12,586
Independence for the Blind of West Florida: $6,925
Opportunity Place, Inc.: $13,000
Ronald McDonald House Charities of NWFL: $13,730
Ronda Coon Women’s Home: $8,946
Salvation Army of Okaloosa County: $18,201
Sharing & Caring of Okaloosa County: $34,864
Shelter House: $42,311

Impact Area: Health

The Arc of the Emerald Coast: $24,049
The Arc of Walton County: $13,561
Bridgeway Center: $2,587
Chautauqua Office of Psychotherapy (COPE): $15,000
Covenant Alzheimer’s Care: $531
Covenant Hospice Care: $14,101
Crossroads Medical Center: $20,717
Elder Services of Okaloosa: $12,781
Mental Health Association of Okaloosa/Walton: $17,099
Okaloosa AIDS Support & Information (OASIS): $13,000
Walton Okaloosa Council on Aging: $17,355

Impact Area: Financial Stability

The 2-1-1 of Northwest Florida: $5,357
American Red Cross: $2,797
Catholic Charities of NWFL: $10,083
Fedding the Gulf Coast: $6,731
Fresh Start for Children & Families: $18,705
Habitat for Humanity in Okaloosa County: $9,921
Habitat for Humanity in Walton County: $3,979
Harvest House: $12,586
Independence for the Blind of West Florida: $6,925
Opportunity Place, Inc.: $13,000
Ronald McDonald House Charities of NWFL: $13,730
Ronda Coon Women’s Home: $8,946
Salvation Army of Okaloosa County: $18,201
Sharing & Caring of Okaloosa County: $34,864
Shelter House: $42,311

Impact Area: Community Impact

Get involved and influence the condition of all.

Give to United Way... it’s as easy as logging on to our website at www.United-Way.org
Advocate for United Way... use your voice, get informed, tell your friends, make some noise.
Volunteer with United Way... & other partner agencies to develop the best opportunities for youth, busy working adults and seniors in our community.