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Terry West
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Michael Korn
Resource Management Chair:
Marianne Hillegass
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Connie Hodges

www.LiveUnitedNortheastFlorida.org

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If you have any questions about your United Way, please call 390-3200.

Community News

AUGUST 2011 NEWSLETTER

United Way Appoints Leadership for 2011-2012

REAL\$ENSE PROSPERITY CAMPAIGN RESULTS

United Way's RealSense Prosperity Campaign is a coalition of more than 60 community and nonprofit agencies, business leaders, government and other key stakeholders dedicated to promoting family financial stability by increasing income, education and assets. In 2011 RealSense volunteers throughout United Way's five-county region helped residents claim refunds totaling more than \$21.5 million — a ten percent increase over the previous year.

"Many hard-working, tax-paying families struggle to stretch their income, particularly in this tough economy," said RealSense Director Jeff Winkler. "By claiming tax benefits and refunds, our clients are taking an important step toward increasing their income and savings."

RealSense connects citizens with programs and services to improve financial stability and from January to April, provides free tax preparation. Other programs offered

include free financial education classes, savings programs, one-on-one credit counseling and affordable banking products and services.

Launched in 2003, nearly 90,000 tax returns have been completed retuning approximately \$98 million in refunds to families in Northeast Florida. RealSense volunteers also saved clients \$3.4 million in tax preparation costs — a four percent increase over the savings in 2010.

RealSense volunteer tax preparers helped tax filers claim nearly \$7 million in Earned Income Tax Credit (EITC) refunds in 2011 — a six percent increase over EITC refunds in 2010. The EITC is a refundable tax credit that can help low-income, working families and individuals pay off debt, build savings and get ahead.

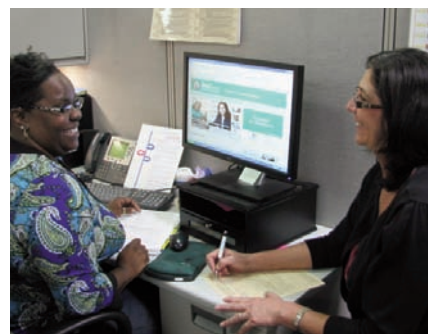
IRS estimates show that 20 to 25 percent of Americans who qualify for the EITC do not claim it

because they are unaware of the opportunity or are concerned about the costs associated with seeking help to file it. During the past eight years, as a result of increased awareness promoted by the RealSense Prosperity Campaign, Northeast Florida citizens have received more than \$30 million in EITC returns.

"This program has become a vital resource for the continued economic growth and well-being of our community," said Winkler. "The credit for these results goes to our strong volunteer base and the active support of our great partners for allowing us to exceed our goals consistently from one tax season to the next."

United Way's RealSense Prosperity Campaign initiative is funded by Bank of America, City of Jacksonville, Jessie Ball DuPont Fund, U.S. Internal Revenue Service, National Disability Institute, Northeast Florida Community Action Agency, SunTrust, United Way of Northeast Florida, Wal Mart and Wells Fargo.

RealSense recognized and thanked more than 300 volunteers and their families at a Jacksonville Suns game for their generous volunteer spirit that provided nearly 30,000 volunteer hours to help families achieve financial stability in 2011.



Michael Beebe, director of IRS, SPEC; Michelle Braun, RealSense chair and SE community relations executive, Wells Fargo; Laura Scherler, director of Income Building, United Way Worldwide; Jeff Winkler, director of RealSense; Connie Hodges, president of United Way of Northeast Florida; Johnette Hartnett, director of Real Economic Impact Tour, National Disability Institute; Kay Schmitz, executive director of the Florida Prosperity Partnership; and Barbara Travis, territory manager, IRS at the RealSense Kickoff in January.

United Way of Northeast Florida's Board of Trustees annual meeting and election of officers for 2011-2012 was abuzz with excitement this year. Going beyond the traditional business meeting, the Board hosted more than 120 community leaders and featured the launch of Changing Lives, Inspiring Communities, Achieving Results – United Way's 2011-2016 Strategic Plan.

Following the presentation of the strategic plan led by Strategic Planning Steering Committee Chair, Lee Thomas, United Way's Board of Trustees elected their leaders for 2011-2012.

Travis Storey has been elected 2011-2012 Chairman of the Board of Trustees. Storey is the office managing partner for KPMG, LLP in Jacksonville. He has served United Way in numerous leadership roles including serving on the Board of Directors, Community Impact Council, Finance, Audit, Resource Management, Tocqueville and Strategic Planning committees.

Michael Korn, attorney at law with Korn & Zehmer, PA, has been re-elected to the Board of Trustees as Chair of United Way's 2011-2012 Community Impact Council. Korn also led the Building Strong Communities Sub Team for the 2011-2016 Strategic Planning Committee and has served as Chair of the Life:

Act 2 Partnership Council from 2002 to 2011.



Chris Doerr
2011-2012 Treasurer
BLUE CROSS AND
BLUE SHIELD OF FLORIDA

Chris Doerr, senior vice president of Finance at Blue Cross and Blue Shield of Florida, has been re-elected as the Treasurer of the Board of Trustees. Doerr has been an active member of the Finance Committee since 2003 and will continue to serve as chair in 2011-2012.

Arie "Chip" Vance, III, vice president and general manager, Enterprise Holdings, has been re-elected as 2011-2012 Chair of the Board of Directors. Vance has been a member of the Board of Directors since 2007. He has also served as a Campaign Cabinet member in 2006 and 2008-2010.



Chip Vance
2011-2012 Board of Directors Chair
ENTERPRISE HOLDINGS



Terry West
2011 Campaign Chair
VYSTAR CREDIT UNION

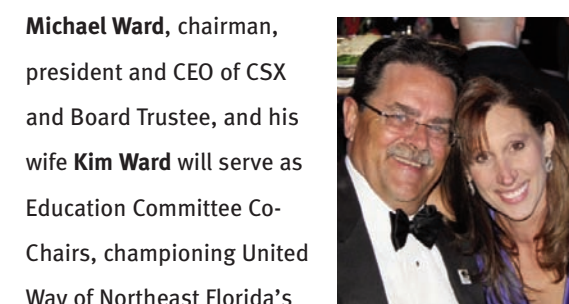
Leading the 2011 Campaign as Chair is **Terry West**, president and CEO of VyStar Credit Union. West is also a member of the Boards of Trustees and Directors, served on the Mobilizing Resources Sub-Team of the Strategic Planning Steering Committee and has provided more than six years of leadership on United Way's Campaign Cabinet, most recently in 2009 and 2010.



J. Wayne and Delores Barr Weaver
Team de Tocqueville and the Tocqueville Society Co-Chairs
JACKSONVILLE JAGUARS

J. Wayne and Delores Barr Weaver will Co-Chair the Tocqueville Society along with the members of "Team de Tocqueville." This group is comprised of donors who support United Way at the \$50,000 level and above. As Co-Chairs, the Weavers will be assisted by the

"Offensive Team" Captains of Robert Hill, Earnie and Brenda Franklin, Chip and Susanna Vance, Cathy and Oscar Munoz, and Elli and Charles Zimmerman. An additional "Scout Team" consisting of Frank Martire, Mike Cascone, Ron Autrey, Terry West and other recruits, will call on the leadership of organizations to thank them for their continued support and to invite new Tocqueville members to join.



Michael and Kim Ward
Education Committee Co-Chairs
CSX

Michael Ward, chairman, president and CEO of CSX and Board Trustee, and his wife **Kim Ward** will serve as Education Committee Co-Chairs, championing United Way of Northeast Florida's proven model for research-based educational strategies, providing leadership in shaping the course of United Way's work in education including policies, advocacy and resource development. Michael has served United Way in numerous leadership roles including as a past Tocqueville Chair, member of the Campaign Cabinet and on the Tocqueville Advisory Committee.

(story continued inside...)

2011-2012 LEADERSHIP (CONTINUED)

Marianne Hillegass, vice president, Operations, and chief resource officer with Baptist Health will serve as the Resource Management Chair. Hillegass has served as a volunteer in the Resource Management process for 15 years, and has served on the Resource Management Cabinet for 11 years.



Marianne Hillegass
2011 Resource Management Chair
BAPTIST HEALTH

dous and we look forward to their active participation in shaping the future direction of United Way.”

STAFF LEADERSHIP

The new volunteer leaders are also joined by some recently announced leadership changes within United Way of Northeast Florida.



Mark LeMaire
Vice President of Legacy Giving

Mark LeMaire, vice president of Legacy Giving, brings 11 years of United Way experience to the Northeast Florida leadership team. He previously served as Director of Life: Act 2 and established himself quickly as a leader within United Way and in the field of aging in Northeast Florida. LeMaire joined the Northeast Florida team in 2005, having led Community Impact for the United Way of Central Florida.

Leading the Marketing and Communications team and responsible for marketing, community and public relations is **Jerri Franz**. She joined United Way earlier this year bringing more than 25 years of public relations and communications experience in both the public and the private sector.



Jerri Franz
Vice President of Marketing and Communications

Linda Malloy, vice president of Resource Development since 2001, has announced plans to retire at year-end following a highly successful career in growing annual workplace giving. Succeeding Linda and transitioning into the Vice President of Resource Development leadership role is **Kim Kaye Namey**. She most recently served as director of Leadership Giving and Resource Development Operations and has more than six years of

United Way leadership experience. She has also led United Way’s Customer Relationship Management strategies and technology, including development of e-Way, a highly secure online pledging and reporting system to simplify workplace campaigns. A



Kim Kaye Namey
Vice President of Resource Development

United Way Worldwide Resident Fellow, she has been responsible for several of United Way’s largest accounts in Northeast Florida including Blue Cross Blue Shield of Florida, Bank of America and Baptist Health.



Coretta Hill
Vice President of Volunteer and Community Engagement

Thousands of donors and volunteers offer their generous support each year and their support is needed now more than ever. Recognizing the importance of expanding volunteer engagement to achieve United Way’s strategic goals as outlined in the 2011-2016 Strategic Plan, **Coretta Hill**, director of Volunteer and Community Engagement, will join the Leadership Team as a vice president with more than eight years total service in the United Way system. Since rejoining United Way of Northeast Florida in 2008, Hill has increased the number of company partner volunteers 350 percent, from 800 to more than 4,000. This represents an increase in volunteer hours of more than 10,000 hours.

“United Way is committed to excellence and accountability for results that make measurable, lasting change in our region,” said Hodges. “With the strength of our new volunteer and internal leadership, our commitment is renewed to keeping students on track to graduation, helping families achieve financial stability and providing the tools to lead healthy and engaged lives.”



Becky Gay
Life: Act 2 Partnership Council Chair
COMMUNITY VOLUNTEER

Taking the leadership mantle from former Chair of the Life: Act 2 Partnership Council Michael Korn, is **Becky Gay**. Gay is a long-time United Way supporter, member of the Board of Directors and is a Women in Local Leadership member. She is a Past Chair of the Bridging Elder Care Networks committee, served on the Resource Management committee, the Building Strong Communities Sub Team of the 2011-2016 Strategic Planning Steering Committee, and the Chronic Disease Design Team for Life: Act 2.

Dawn Lockhart, president and CEO of Family Foundations, will serve as the 2011-2012 United Way Agency Directors Association representative on the Board of Directors.



Dawn Lockhart
2011 UWADA Chair
FAMILY FOUNDATIONS

“We are honored to have such outstanding leadership for United Way’s Board of Trustees and Directors,” said Connie Hodges, president of United Way of Northeast Florida. “The commitment and dedication of these community leaders has been tremen-

2011-2012 UNITED WAY BOARD & VOLUNTEER LEADERSHIP (CONTINUED)



Greg Smith
2012 Campaign Chair
Bank of America



Lucy Talley
2013 Campaign Chair
The Florida Times-Union



Irene Lazzara
Honorary Chair, Success By 6
Partnership Council
Community Volunteer



Anne Lufano
Co-Chair, Success By 6
Partnership Council
Community Volunteer



Susan Main
Co-Chair, Success By 6
Partnership Council
Early Learning Coalition of Duval



Melanie Husk
Chair, Marketing and
Communications Committee
Baptist Health



Steve Potter
Chair, Volunteer and Community
Engagement Committee
CSX



Katherine Foster
Co-Chair, Women In Local
Leadership (WILL) Executive
Committee
State Farm Insurance Company



Susanna Vance
Co-Chair, Women In Local
Leadership (WILL) Executive
Committee
Community Volunteer



Justin Spiller
Chair, Atlantic Circle Executive
Committee
The Spiller Firm PL



Chris Hazelip
Chair, Achievers For Life
Partnership Council
Rogers Towers PA



Franz C. Wallace
Chair, Full Service Schools
Leadership Council
Community Volunteer



Judy Walz
Chair, 2-1-1 Advisory Committee
VyStar Credit Union

STUFF THE BUS!

Every school year, thousands of Northeast Florida children return to school without even the most basic school supplies. To be ready to learn and successful in class, they need the school supplies that many take for granted.

Stuff the Bus, the annual First Coast News drive to collect school supplies for Northeast Florida children wraps up on Aug 6. First Coast News, United Way, The Salvation Army, Publix and Community First Credit Union have teamed up to help provide much needed school supplies to Northeast Florida children. You can help. While time is running out, there’s still time to drop off some last minute supplies

New this year, Stuff the Bus will be reaching even more children through the annual backpack and school supply

drive through a partnership with the United Way- and Duval County Public Schools-led Full Service Schools (FSS) program. FSS is a neighborhood-based program to remove barriers to academic success and reduce behavioral referrals supporting eight area schools.

Donation barrels are still available at area Publix and Community First branch locations – ready and waiting for your donations – through Saturday, August 6. United Way encourages those who can help to do so by dropping off school supply donations to support children in our communities. For more information on how you can help and a list of needed supplies, visit the Stuff the Bus website at www.firstcoastnews.com/life/community/stuffthebus



Drop off those school supplies today!



BACK TO FOOTBALL FRIDAY

Are you ready for some football?! United Way and the NFL are teaming up to Live United and support youth health and wellness in our community. Show your support for the Jacksonville Jaguars through our Back to Football Friday celebration.

Join United Way of Northeast Florida and let’s Turn the Town Teal on Friday, Sept. 9. More details on how your workplace can get involved coming soon. **GO JAGS!**

For more info go to liveunited.org/page/s/back-football-friday