

COMMUNITY IMPACT REPORT

2020-2021

United
Way



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Indian River County

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A note from our leadership –

We can hardly fathom how far we've come since we first learned of the coronavirus. It was a moment in time that changed us in ways we couldn't imagine. But the work never ceased for us at United Way, and our doors remained open because those we serve needed us more than ever.

Despite this once-in-a-generation challenge, we stepped up, doing what we do best – mobilizing people and resources for the well-being of all. Our network of community partners held firm, enabling us to implement a safety net of emergency services and distribute CARES Act funds reaching every corner of Indian River County.

Even with an overwhelming amount of turmoil, we made time to honor Michael Kint, who served our organization for 25 years and was integral to many significant initiatives that improved the lives of our neighbors.

Every single day, we are proud to be the first to address our neighbors' critical needs. Whether widespread hurricane damage or a global pandemic, we are uniquely positioned to create lasting solutions in times of disaster; this is what United Way is made for.

No matter what lies ahead, we will never waiver in our commitment to fight for the health, education, and financial stability of every person in our community. We know the future will be different than we once imagined, and addressing these challenges has only just begun. Still, together we can build a better Indian River County than we ever imagined.

Thank you for your investment and involvement with our United Way.

Be safe and stay well,

A handwritten signature in black ink, appearing to read "Jeff Schlitt".

Jeff Schlitt
Board Chair

A handwritten signature in black ink, appearing to read "Meredith Egan".

Meredith Egan
Chief Executive Officer

IMPACT AT A GLANCE

To effectively address our community's most persistent problems, we must have an organized proven strategy.

We're more than just a funder. United Way is the place where we can all make a bigger difference for those in need. With countless ways to give, advocate, and volunteer, we combine every gift to drive maximum impact in our fight for the Health, Education, and Financial Stability of every person in our community.

In 2020-2021, the Community Impact Fund provided grants to 46 programs that align with our goals. Through this fund, United Way confronts our community's biggest challenges to drive measurable results and lasting change.

Through United Way funded partners and programs –



952 SENIORS

accessed nutritious meals



1,834 CLIENTS

were diverted from homelessness



17,603 INDIVIDUALS

received a health screening or intervention service



94% OF CHILDREN

in after school programming are performing at or above grade level



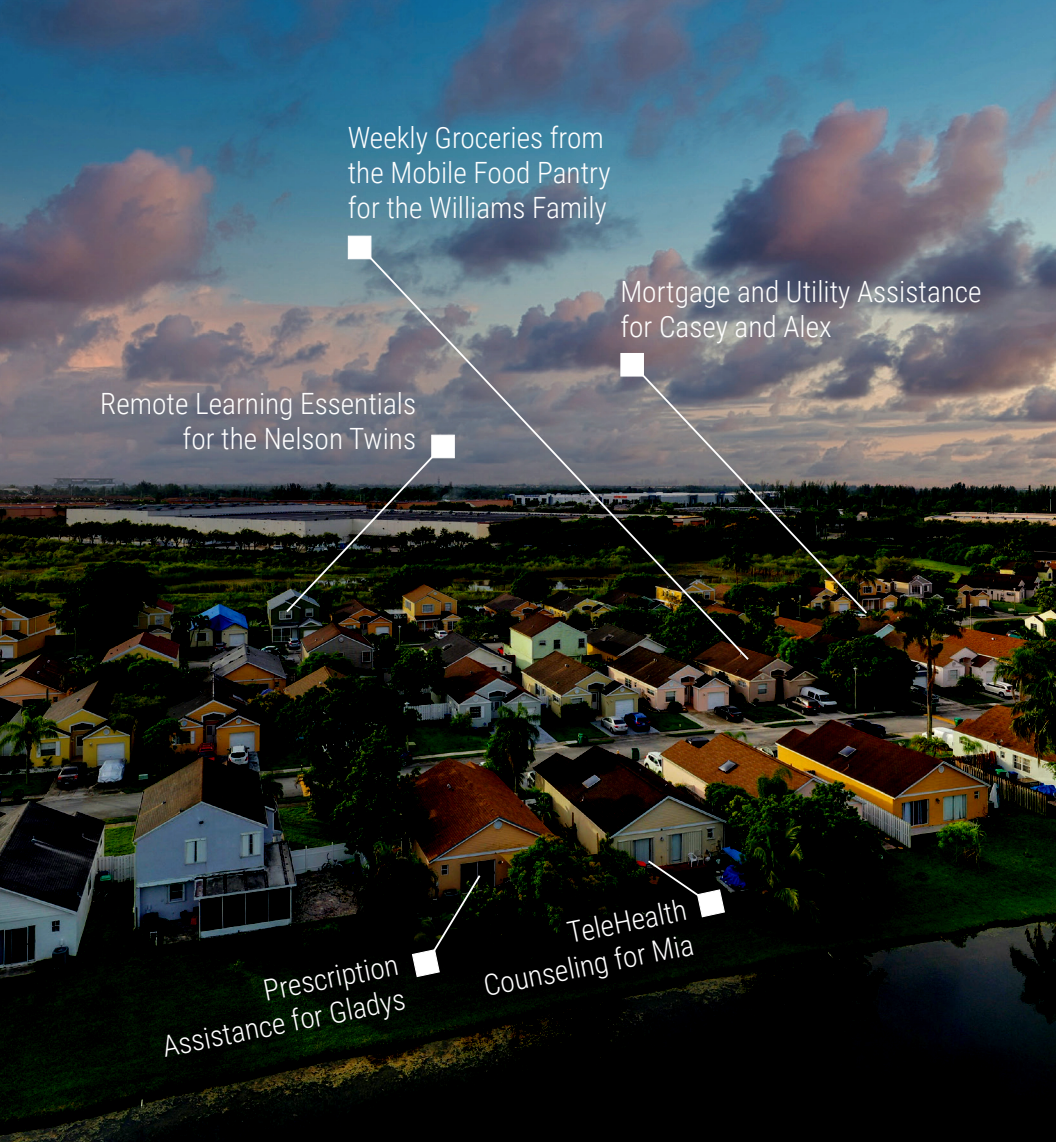
74% OF CLIENTS

increased their wages and improved employability skills



1,394 CLIENTS

received an average tax refund of \$1,165 through the VITA program



Weekly Groceries from the Mobile Food Pantry for the Williams Family

Mortgage and Utility Assistance for Casey and Alex

Remote Learning Essentials for the Nelson Twins

Prescription Assistance for Gladys

TeleHealth Counseling for Mia

42 COMMUNITY PARTNERS

Total 2020-2021 Community Investment (46 Programs): \$1,744,907

- Investment in Health: \$658,917**
- Investment in Education: \$732,088**
- Investment in Financial Stability: \$353,902**

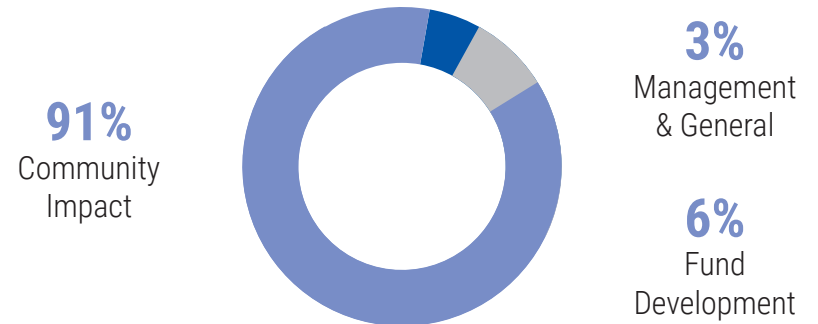
- 211 Palm Beach/Treasure Coast
- American Red Cross, South Florida Region
- Big Brothers, Big Sisters of St. Lucie, Indian River & Okeechobee Counties, Inc.
- Boys & Girls Clubs of Indian River County
- Camp Haven, Inc.
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- Indian River County Emergency Management Dept.
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- Mental Health Collaborative of Indian River County, Inc.
- Moonshot Community Action Network
- Redlands Christian Migrant Association, Inc.
- Safespace, Inc.
- Senior Resource Association, Inc.
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- SingleCare Prescription Discount Cards
- Substance Awareness Center of Indian River County, Inc.
- The Arc of Indian River County, Inc.
- The Learning Alliance, Inc.
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- Treasure Coast Homeless Services Council, Inc.
- Tykes & Teens, Inc.
- United Against Poverty, Inc.
- Veterans Council of Indian River County, Inc.
- Visiting Nurse Association & Hospice Foundation, Inc.
- Volunteer Income Tax Assistance/My Free Taxes
- Youth Guidance Donation Fund of Indian River County, Inc.

YOUR INVESTMENT MATTERS

Donors continue to see the value of investing in United Way's strategic approach to local problems, leading the way from quick fixes to real, lasting change. Individuals, businesses, corporations, and foundations supported UWIRC's effort to bring in nearly \$6 million in fiscal year 2020-2021.

Please find copies of our IRS 990 and most recent audit at [UnitedWayIRC.org/finances](https://www.unitedwayirc.org/finances).

TOTAL EXPENSES



INCOME

Public Support & Revenue	\$5,980,838
Net Campaign Revenue	\$2,637,267
Federal Grant Revenue - CARES Act	\$2,427,198
Community Response Fund	\$18,068
In-kind Contributions	\$182,097
Investments, Net	\$324,956
Other	\$391,252

EXPENSES

Community Support Services	\$5,219,248
Campaign Fund Development	\$276,913
Management & General	\$150,235

Total Expenses	\$5,646,396
Changes in Net Assets	\$334,442
Net Assets, Beginning of Year	\$2,247,080
New Assets, End of Year	\$2,581,522



RESPOND. RECOVER. REIMAGINE. REBUILD.

With your support, over the last two years, we raised, leveraged, and distributed more than \$3.8 million for COVID-19 crisis response work.

The first \$1.4 million came from donations to our COVID-19 Community Response Fund, then federal CARES Act funding became available. United Way was selected as a trusted partner with Indian River County to serve as a conduit for local organizations responding to the crisis.

Along with our network of local partners, we helped to ensure aid for families and people who were in need of services like food, shelter, emergency utility assistance and more. Together, we helped families stay in their homes, kept people fed, supported students' virtual learning, and helped our most vulnerable neighbors stay healthy and safe.

While the future is still uncertain, we do know it will take time for people to get back on their feet. United Way will be there every step of the way, working with partners to address immediate needs to fill gaps quickly, and helping our community rebuild to become stronger, more equitable, and more resilient.

ALICE & THE PANDEMIC DIVIDE

Before COVID-19 hit, 51 million households in the United States already could not afford the basics. These struggling families fall below the ALICE Threshold. This includes those in poverty and **ALICE** (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed), earning above the poverty level, but less than what it takes to survive.

Indian River County Statistics

- **Population:** 157,413
- **Number of Households:** 57,636
- **Median Household Income:** \$57,508
- **Household Survival Budget:** \$60,696*
- **Struggling Households in IRC:** 25,360

The next ALICE Reports will be released in 2022 with focus on Children, Disabilities, and Veterans in the U.S.

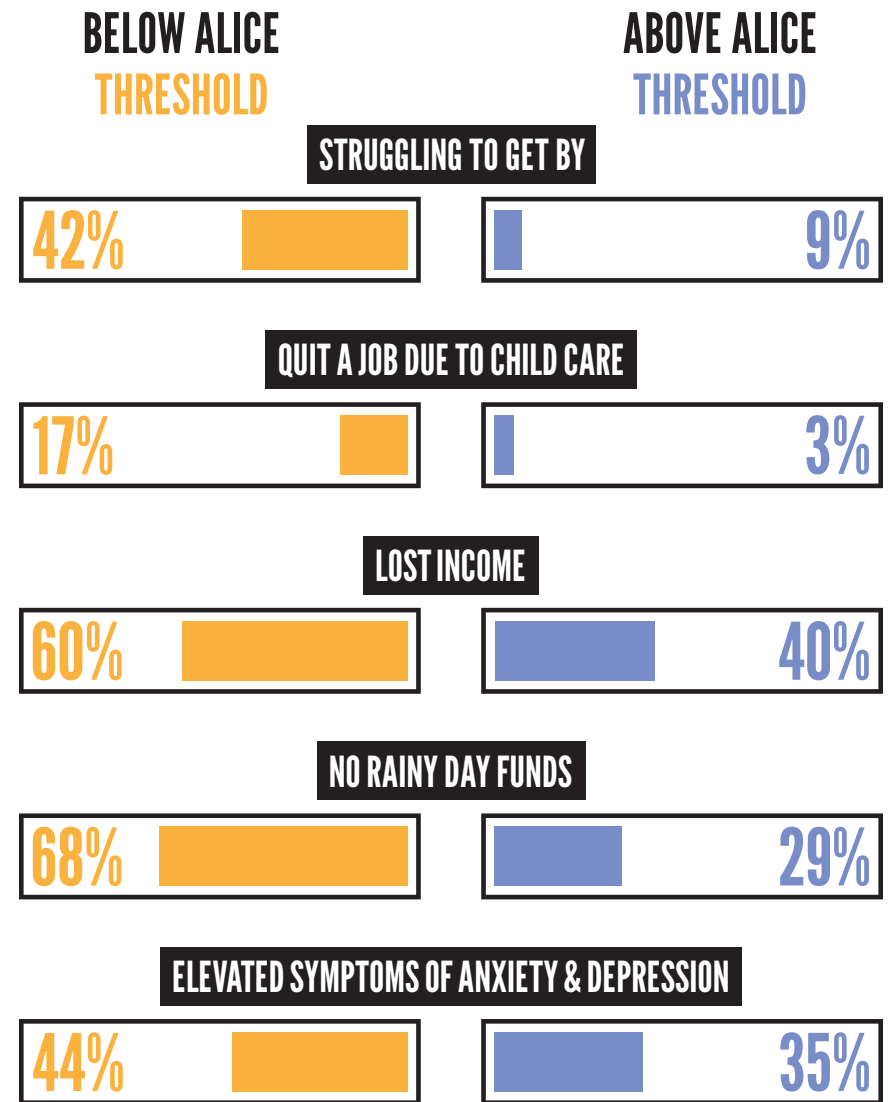
Learn more about ALICE and The Pandemic Divide at [UnitedWayIRC.org/ALICE](https://www.UnitedWayIRC.org/ALICE).

* Household survival budget for a family of two adults and two young children or \$5,058 monthly. For a one-person household, the annual survival budget is \$23,568 or \$1,964 a month.

Source: United for ALICE, (2021, October). *The Pandemic Divide: An ALICE Analysis of National COVID Surveys*. Retrieved from <https://www.UnitedForALICE.org/National-Reports>.

Source: *ALICE Threshold, 2007-2018; American Community Survey, 2007-2018*

The highs and lows of the pandemic have been experienced very differently across the U.S. population. ALICE and households in poverty fared far worse during the pandemic than higher-income households.





ALICE FAMILIES

ALICE families with children face additional hardships and are especially vulnerable to the disruptions that accompany child care, school, and business closures.

- Almost 1 in 4 families with children in the U.S. have income below the ALICE Threshold
- More than 25% of households below the ALICE Threshold do not have adequate internet access compromising participation in e-learning
- Parents who need to work cannot stay home leading to health and safety issues for unsupervised children
- ALICE families can lose access to other supports, such as free or reduced-price breakfasts and lunches provided for children at school

“I gave birth to my daughter two months into lockdown and was furloughed without pay for the next three months. It was terrifying to have a mortgage, medical bills, and now no money for child care. But one of the hardest parts was being isolated as new parents. The physical stuff was hard, but the emotional stuff was harder. I know we’re not the only ones who went through it... there needs to be mental health outreach for these and other difficult experiences.”



ALICE & MINORITY COMMUNITIES

Whether working in essential roles in the health care industry or working from home, minority ALICE workers are still struggling paycheck to paycheck. These disparities are being fed by multiple factors:

- 60% of Black households are unable to afford basic household essentials, internet or computers, and have more difficulty working from home
- Minority families remain disproportionately likely to live in substandard housing in neighborhoods of concentrated poverty – those with few grocery stores, banks, parks or recreation facilities
- Minority households and communities have long faced institutional barriers to quality health care services and well-funded public schools
- Black and Hispanic ALICE workers face higher rates of unemployment from industries like food service, leisure, hospitality, and tourism that have been hit the hardest

“Mental health for me personally is poor due to the changes associated from shifting to at-home work, juggling distance learning, adapting to ‘new normal’, learning new technology, and losing the sanctuary of my home (every room is now an office).”



ALICE SENIORS

People over the age of 60 are the age group most susceptible to serious illness from COVID-19. Half of seniors in the U.S. have income below the ALICE Threshold; they have no extra income and little or no savings to cover extra health care costs.

- More than 40% of U.S. coronavirus deaths are linked to nursing homes, which puts both ALICE seniors and ALICE health care workers at higher risk
- ALICE seniors are at higher risk of loneliness and isolation, and risk declining nutrition and health as social distancing limits trips to the grocery store and preventative care visits
- When senior centers close, ALICE seniors and their families must navigate additional burdens, such as taking on care giving responsibilities and adapting to the loss of supports like hot meals and social activity

“I had a credit card maxed out and lost my health insurance because I couldn’t pay for it. All jobs require either reliable transportation or Internet speeds of 10/5 and I have neither, and have no way to obtain either. I literally don’t have enough money to work. This is not how I thought my life would be at 55. I barely have enough food. I can’t even worry about retiring in 20 years.”



SOCIALLY DISTANCED EVENTS

Month with a Mission

Day of Caring looked a little different this year, but our mission remained the same in 2020: to help volunteers give back to Indian River County. Instead of just one day, we promoted an entire month of service.

Chalk Your Walk Competition

The idea is as simple as it was in childhood: share a positive message, have fun doing it, and spread some joy while you're at it. And in the end, Allena Hendrix at Gifford Youth Achievement Center won and her artwork was printed on a limited edition United Way t-shirt!

Clean & Read

In observance of National Volunteer Week, our neighbors were invited to join us as we spruced up Little Free Libraries in our community. While some libraries got fresh new books, one in particular was completely rebuilt.

Trivia Night

Without an annual thank you event for our Alexis de Tocqueville and leadership donors, we took to Zoom. Trivia was paired with wine and a charcuterie board, and their United Way knowledge was put to the test.

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** Donations received from July 1, 2020 through June 30, 2021.*

With an annual gift of \$10,000 or more, Alexis de Tocqueville Society members are creating a profound and lasting impact throughout Indian River County.

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Mr. and Mrs. Howard Thrailkill

LEADERSHIP DONORS

SILVER CIRCLE (CONTINUED)

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Mr. and Mrs. William Tobin	Tiffany L. Wilder
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Mr. and Mrs. Ronald Watkins	Jerry and Ellen Zollenberg
Mr. Douglas K. Watson and Ms. Susan Hunter	

SPONSORS

TORCHBEARERS

Bernard A. Egan Foundation, Inc.	IRC School District
Cleveland Clinic Indian River	Piper Aircraft, Inc.
Florida Power and Light Company	Publix Super Markets
Indian River County	Wells Fargo

ELITE CAMPAIGN

Alex MacWilliam Real Estate	Kmetz, Elwell, Graham & Associates
AYS Employee Leasing	Marine Bank
Dale Sorensen Real Estate, Inc.	Rossway Swan Tierney Barry
Disney's Vero Beach Resort	Schlitt Services, Inc.
Florida Power and Light Company	SouthState Bank
Graves Brothers Company	USI Insurance Services

WORKPLACE CAMPAIGNS

All Rite Water Purification	Law Offices of John E. Moore, III
AT&T	Literacy Services
AYS Employee Leasing	Marine Bank
Bank of America	Mental Health Association
Best Buy Store #816	Mental Health Collaborative
Boys & Girls Clubs of IRC	Morgan, Jacoby, Thurn, Boyle & Associates
Camp Haven	Northern Trust
Childcare Resources of Indian River	Nylacarb Corporation
Children's Home Society	Piper Aircraft, Inc.
City of Fellsmere	PNC Advisors
City of Sebastian	Publix Super Markets
City of Vero Beach	Raymond James & Associates
Cleveland Clinic Indian River	Redlands Christian Migrant Association (RCMA)
Croom Construction	Regency Windsor Companies
Crossover Mission	Rehmann
Cypress Trust Company	Riverside Theatre
Dillard's	Rossway Swan Tierney Barry Lacey & Oliver, P.L.
Donadio and Associates	SafeSpace
Economic Opportunities Council of IRC	Samaritan Center
Elliot Merrill Community Management	Schlitt Services, Inc.
Enterprise Holdings	Seacoast Bank
Federal Express Corporation	Senior Resource Association
Fellsmere Farms	South State Bank
Florida Floor Fashions	Space Coast Credit Union
Florida Power and Light Company	Substance Awareness Center of IRC
George E. Warren Corporation	SunTrust Bank
Gould Cooksey Fennell	Target
Gifford Youth Achievement Center (GYAC)	TD Bank
HealthSouth	The Arc of Indian River County, Inc.
Hibiscus Children's Center	The Hill Group
Indian River County	The Learning Alliance
IRC Clerk of the Circuit Court	Town of Indian River Shores
IRC Healthy Start Coalition	Treasure Coast Community Health (TCCH)
IRC Property Appraiser	Tykes & Teens
IRC School District	United Parcel Service
IRC Sheriff's Office	United Way of IRC
IRC Supervisor of Elections	Veterans Council of Indian River County
Indian River State College	Visiting Nurse Association (VNA)
John's Island Real Estate Company	Walmart
JC Penney Company	Wells Fargo
Kmetz, Elwell, Graham & Associates	Windsor (Torwest)
The Law Offices of Jennifer D. Peshke, P.A.	Youth Guidance



**UNITED WAY
FOUNDATION**
OF INDIAN RIVER COUNTY



United Way Foundation of Indian River County, Inc. is a separate nonprofit organization classified as a Type I supporting organization. It is governed by a local volunteer Board of Directors comprised of financial professionals and community leaders.

The Foundation is committed to building a permanent endowment by generating funds in support of the community-wide work of United Way of Indian River County.

Please find copies of our IRS 990 and our most recent audit at UnitedWayIRC.org/finances.

BOARD OF DIRECTORS

Clay Price
Chairman

Jan S. Beck
Chris Clifford

David Sams
Vice Chairman

Dennis Ferro
Bill Grealis

Dennis Marlo
Treasurer

Anthony Guettler
Dawn Michael

Mike McGee
Secretary

Chad Morrison
Suzanne Seldes

Elizabeth Ullian
Executive Director

Leslie Swan
Judy Whittaker

UNITED WAY FOUNDATION

For the last several years the United Way Foundation has worked on a critical project to secure the financial future of United Way of Indian River County- building an endowment. The commitment of our Legacy Donors allows UWIRC to make the most effective plans for the future, no matter what lies ahead.

At the end of the 2020-2021 fiscal year, the United Way Foundation had \$5.75 million in assets under management with another \$6 million in documented legacy gifts that will be realized in the future. Gifts to the Foundation are invested for growth with a percentage available for distribution each year to support and sustain the critically important work being done by UWIRC.

If United Way of Indian River County has been an important part of your charitable giving we would welcome an opportunity to meet with you and discuss legacy options that best suit you and your family's goals.

To learn more about endowing your annual support call Elizabeth Ullian, Executive Director, United Way Foundation, at (772) 569-6777.

ENDOWMENT FUNDS



24.8%
Annual Campaign
Endowment Fund

75.2%
General
Endowment Fund

ASSETS

Annual Campaign Endowment

Endowed funds restricted in purpose to solely support United Way partner agency programs as part of United Way's annual community investment process.

General Endowment

Endowed funds not restricted by donor in purpose to be used at the board's discretion.

INCOME

Contribution	\$108,100
Investment Return, Net	\$1,149,530

TOTAL

Public Support & Revenue	\$1,257,630
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EXPENSES

Community Support Services	\$102,353
Endowment Operations	\$108,017

Total Expenses	\$210,370
Changes in Net Assets	\$1,047,260
Net Assets, Beginning of Year	\$4,489,915
Net Assets, End of Year	\$5,537,175



TOCQUEVILLE LEGACY CIRCLE

The following individuals have either made or made provisions for a thoughtful legacy gift to endow their annual gift to the United Way of Indian River County as members of the esteemed Alexis de Tocqueville Society. Each year, the Foundation will make a gift of \$10,000 or more to the annual campaign in their names in perpetuity.

Fred M. and Gay C. Blaicher
Dick and Sally Brickman
Chris and Keena Clifford
Edward and Sherry Ann Dayton
Ralph T. King
Jay and Linda Knoll
Betty and Jim McDonald

Edward and Dawn Michael
Lee and John Moore
Marjorie Hopwood Richardson and
Danforth Kidd Richardson
Sandy and Randy Rolf
Marlynn and Bill Scully

LEADERSHIP LEGACY CIRCLE

The following individuals have either made or made provisions for a thoughtful legacy gift to endow their annual gift to the United Way of Indian River County as members of the distinguished Leadership Investment Society. Each year, the Foundation will make a gift of \$1,000-9,999 to the annual campaign in their names in perpetuity.

Norman and Ann Baker
Bill and Nancy Curtis
Chris and Don Loftus
Jim and Melinda Marley
Chad & Lisa Morrison
Joseph Mullaney

Dr. Julie Vargo and
Dr. David O'Brien
David and Betsy Sams
Daniel and Karen Somes
Mr. and Mrs. Norval B. Stephens, Jr.
Peter and Terry Sullivan

LEGACY SOCIETY

The following companies, private foundations, and individuals have made or made provisions for gifts to the Foundation to support the many facets of the critically important work of our local United Way here in Indian River County for generations to come.

43 donors who wish to
remain anonymous
Fran Adams
Valerie and Douglas Anderson
Eve Ballance in honor of
Norma Lister
Alan Bartol
Robert W. Bauchman
Lea Beadle Charitable Fund
Sandra Block in honor of
Barbara C. Block
Clair Brunetti
Mr. and Mrs. Anthony Buford, Jr.
Michael and Miriam Burns
Donald R. and Myra J. Burns
Doris Land Butler, in loving
memory of Grace R. Byrd
Peter Roy Carney
Richard Canty and
Hope Woodhouse
John "Jack" Chamberlain
Susan L. Chenault
Mr. and Mrs. J. Warner Clark
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Richard and Lucy Hope
J. M. Hopwood Charitable Trust
Mr. and Mrs. William B. Howell
William K. & Barbara W. Howell
Henry H. Hoyt, Jr.
Allen and Ann Hubbard
Mr. and Mrs. William Y. Humphreys
Indian River National Bank

LEGACY SOCIETY CONTINUED

Ilain Isaac
Mr. and Mrs. Richard S. Jackson
Kip and Mary Jacoby
Downing Jenks Charitable Trust
George and Sandy Kahle
The Kahle Foundation
Michael and Sandy Kint
William N. Kirk
Mr. and Mrs. F. Curtis Lane
Bobby and Lynn Lindsey
John J. and Francesca W. Logan
Mr. and Mrs. William E. Lower
Marcia P. Lunka
John and Nancy Luther
Alma Lee Loy
Ursula Ma
Michelle and Josh Malyn
Mr. and Mrs. Thomas Manwaring
The Estate of Stanley T. Manzer
Joseph L. and Sarah S. Marcum
Dennis and Karen Marlo
Ed and Jo Massey
Walter J. and Mae S. Matthews
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Mildred D. McMichael Trust
David and Claudia McNulty
Dr. and Mrs. Roger Meyer
Mrs. Helen F. Miller in memory of
Danforth Miller, Jr.
Manley H. Mitton Trust
David Mixer and Carol Baldwin
John E. and Lee R. Moore
Mr. and Mrs. Charles W. Moritz
Nextera Energy Foundation, Inc.
The M. J. O'Brien Family Foundation
Anonymous Gift in Living Honor of
Ralph and Jane King
O'Malley and Siedler Families
Beverly B. O'Neill

Mr. Richard W. Paul
Raymond W. Paulsen
Bill and Karen Penney
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William and Mary Phelan
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Louise L. Smith
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Mr. and Mrs. Benjamin F. Stahl, Jr.
Estate of Florabel L. Stevens
Norman W. and Ann R. Stewart
Tommy and Simonetta Steyer
Rosanne and Jeffrey L. Susi
Leslie and Michael Swan
Lois and Jim Thompson, in honor
of J.A. "Coach" Thompson
Mr. and Mrs. Mark Thurn
Mr. and Mrs. Charles M. Travis
Estate of Helen M. VanBlarcum

LEGACY SOCIETY CONTINUED

Mary Beth Vallar
Deborah Vickers
James and Faith Victory
Christine and Mike Videtic
Ethel M. Wasmuth Trust
Karl E. Wenk, Jr.
Lewis Stanley and
Myrna Newell Whitaker

Kent and Judith Whittaker
Elizabeth Whittall
Andy and Robin Williams
Archie S. Wingfield, Jr.
Charitable Trust
Henry and Joan Woodhouse

MEMORIAL GIFTS

Memorial gifts celebrating the life of the following individuals have been made by their family, friends and colleagues to honor their philanthropic spirit and forever support United Way's work in advancing the common good here in Indian River County.

Louis Allocca	Benjamin Jaques	Elizabeth M. Rich
Elliot A. Baines	Charles R. Johnson	Charlotte Anne Rolfe
Jesse Loy Baldwin	Ruth Karpf	William Romanowski
Kathleen Branca	Ray Kempkin	Marguerite Schlitt
Elmer T. Browne	Ralph King	Marguerite Lydia
Margot Coleman	Thomas A. Lewis	Shattuck
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Hayden Harlow	Martin G. Noon	
Doris Hardesty	Kay and Walter O'Malley	
Mabel B. Harris	Christy Pappadouplos	
Mr. Forrest Haselton	C. Gorham Phillips	
Mr. and Mrs. William	Alphonsus Polackwich	
B. Howell	Mitchell Rendell	

OUR MISSION

TO IMPROVE LIVES BY MOBILIZING THE
CARING POWER OF OUR COMMUNITY.



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