

United Way of Indian River County

Responsibly Managed Since 1961 Community Impact Report [2021-2022]



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A NOTE FROM LEADERSHIP

CHEERS TO 60 YEARS!

PAGE

Since 1961, it's been our mission to improve lives by mobilizing the caring power of our community. Supporters like you have made that possible, and we're so glad you've joined us for the last 60 years! You've helped drive real, measurable change in our immediate area and neighborhoods where we live, work, and play. Your support, combined with thousands of others, is a robust investment in the future of our community. We cannot thank you enough!

With such a milestone achievement, we took a moment to reflect on our history, but we knew it was time to turn our focus to the future. With our Board's strength and passion, our organization's strategic goals came more clearly into focus. Not only did we move forward with our Strategic Plan, but we've been able to add more programs and expand our campaign with new workplaces and partnerships. We continue relentlessly toward our goal and couldn't have done that without our community. Our success is due to our collective diligence and drive.

We all thought this past year would be easier than the previous. However, finding success through another year of cancellations and constant changes all around us would not have been possible without your support. The people in our community are lucky to have you as their neighbors and friends.

We are so proud of where we have come and what has been accomplished, and know our brightest days are on the horizon. We hope you will join us on this adventure!

Thank you,

Jeff Schlitt Board Chair

Weredich Ega-

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 2021-2022, the Community Impact Fund provided grants to 45 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 -

■ 2,514 individuals were able to access mental health services

27,462 individuals had nutritious food

■ 4,308 individuals in crisis received services within 48 hours of their request **877 children** participating in United Way funded programs are developmentally on track PAGE

659 children

enrolled in United Way funded programs have made significant gains in core academic subjects

A GOAL FOR THE FUTURE

PAGE

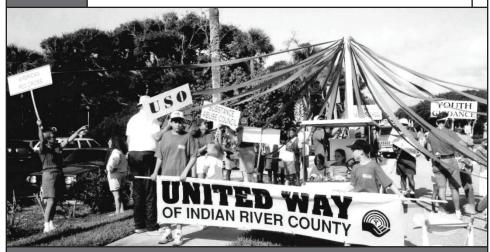


Strategic Plan Objectives: 2022-2024

- Ignite our Community Impact Strategy to increase impact while cultivating a culture of learning and evaluation
- **Expand** and diversify the range of supporters and deepen relationships to grow revenue
- Increase brand awareness to make United Way of Indian River County a recognized, respected, and "go to" resource
- **Enhance** operational excellence and strengthen our infrastructure

COMMUNITY PARTNERS

PAGE



Total 2021-2022 Community Investment: \$1,798,068 —

- 211 Palm Beach and Treasure Coast
- American Red Cross, South Florida Region
- Big Brothers, Big Sisters of St. Lucie, Indian River & Okeechobee Counties
- Boys & Girls Clubs of Indian River County
- Camp Haven
- Catholic Charities of the Diocese of Palm Beach
- Childcare Resources of Indian River
- Children's Home Society of Florida, Treasure Coast
- Crossover Mission
- Drug Abuse Treatment Association
- Early Learning Coalition of Indian River, Martin & Okeechobee Counties
- Economic Opportunities Council of Indian River County
- Education Foundation of Indian River County
- Emergency Operations Command Center of Indian River County
- Environmental Learning Center
- Executive Roundtable of Indian River County
- Gifford Youth Achievement Center
- Hibiscus Children's Center
- Hope for Families Center
- Indian River County Healthy Start Coalition

COMMUNITY PARTNERS

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Health: \$649,477 Education: \$788,112 Financial Stability: \$360,479 -

Indian River Habitat for Humanity

- Literacy Services of Indian River County
- Mental Health Association in Indian River County
- Mental Health Collaborative of Indian River County
- Moonshot Community Action Network
- Redlands Christian Migrant Association
- SafeSpace
- Senior Resource Association
- Senior Collaborative of Indian River County
- SingleCare Prescription Discount Cards
- Substance Awareness Center of Indian River County
- The Arc of Indian River County
- The Learning Alliance
- Treasure Coast Community Health
- Treasure Coast Food Bank
- Treasure Coast Homeless Services Council
- Tykes and Teens
- United Against Poverty
- Veterans Council of Indian River County
- Visiting Nurse Association and Hospice Foundation
- Volunteer Income Tax Assistance/My Free Taxes
- Youth Guidance Mentoring Program

YOUR INVESTMENT MATTERS

PAGE

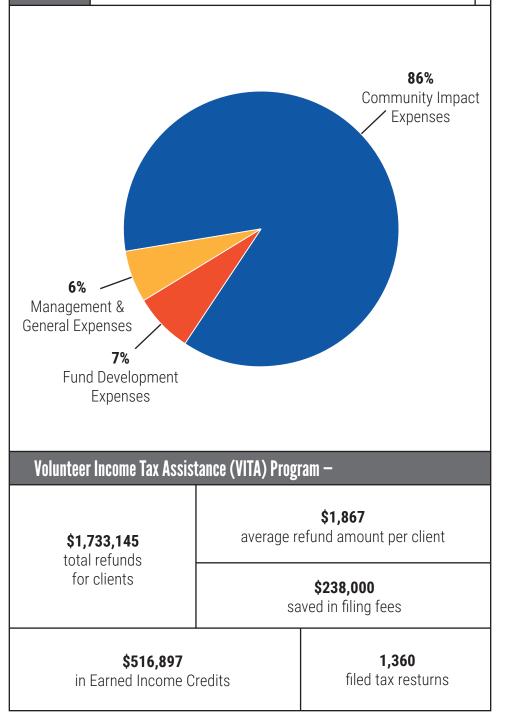
Donors continue to see the value of investing in United Way's strategic approach to local problems,

leading the way from quick fixes to real, lasting change. Individuals, businesses, corporations, and foundations supported UWIRC's effort to bring in nearly \$3 million in fiscal year 2021-2022.

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

Income –	
Public Support & Revenue	\$2,881,515
Net Campaign Revenue	\$2,385,422
Federal Grant Revenue - CARES Act	\$350,000
Community Response Fund	\$26,196
In-kind Contributions	\$90,858
Investments, Net	(\$136,569)
Other	\$165,608
Expenses –	
Community Support Services	\$2,738,050
Campaign Fund Development	\$262,650
Management & General	\$203,050
Total Expenses	\$3,203,750
Changes in Net Assets	(\$322,235)
Net Assets, Beginning of Year	\$2,581,921
New Assets, End of Year	\$2,259,686

TOTAL EXPENSES



60 YEARS OF HISTORY

A woman, a priest, and a rabbi...

In 1887, a Denver woman, a priest, two ministers and a rabbi got together... It sounds like the beginning of a joke, but they didn't walk into a bar; what they did do was recognize the need to work together in new ways to make Denver a better place - an idea that became the nation's first united campaign and created a movement that would become United Way.

1961

In Indian River County, the United Fund was formed, raising \$44,367 for social service agencies. The first campaign lasted 28 days and was organized out of a fourdraw file cabinet housed in the Chamber offices. Piper Aircraft marks the first Workplace Campaign raising \$25,000.

1971

Under the leadership of Jim Thompson, \$97,901 was raised, and 21 agencies received funding.

1973

United Way joins forces with the NFL to create public service announcements and programs featuring NFL players, coaches and owners to boost awareness of social service issues. The "one gift works many wonders," campaign, featuring Woody the Woodpecker helps thousands of residents.



60 YEARS OF HISTORY

1976

PAGE

The United Fund Board of Directors unanimously voted to change the organization's name to the United Way of Indian River County, Inc.

1977

The expansion phase welcomed the beginning of the Volunteer Bureau and a county-wide Information and Referral Service.

1985

The 1st Annual Citrus Golf Tournament tees off.

1987

The national United Way Movement turns 100.

1992

The first Annual Community Leader's Breakfast was held. After Hurricane Andrew, a Special Response Fund was established to set 10% aside of money raised enabling non-partner agencies to apply for special project funds.



60 YEARS OF HISTORY

1993

Volunteers rolled up their sleeves for the first Annual Day of Caring.

1997

Citrus Holiday Fundraiser begins.

2001

Celebrating our 40th Anniversary, funding increased to \$1.6 million.

2004

In wake of Hurricane Charley, Frances, and Jeanne, \$200,000 was authorized for emergency disaster response and recovery relief efforts.

2006

United Way Center calls 1836 14th Avenue home.

2010

United Way charts success: 50 years, \$39 million raised and VITA takes on its first clients.

2011

The United Way Foundation of Indian River County was established with \$2.3 million in assets.

60 YEARS OF HISTORY

2014

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Success By 6 was created to address problems facing children six years old or younger. 2014 marks the first pitch at the Jackie Robinson Celebration Game.

2015

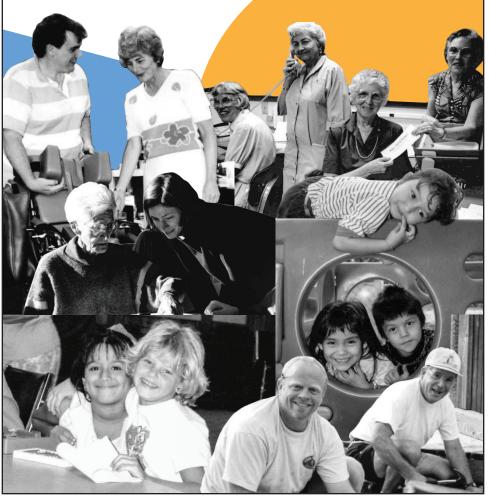
Move toward Community Impact Model.

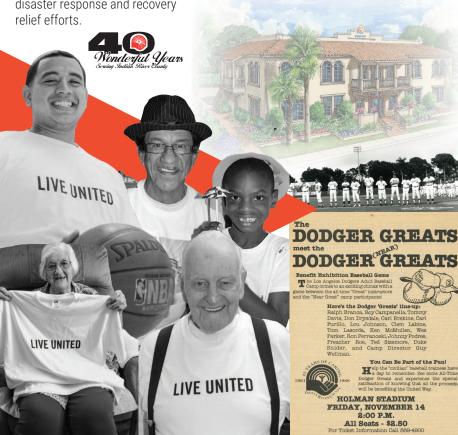
2020

United Way raised \$5.2 million for COVID-19 pandemic and becomes funding agent for CARES Funds in partnership with Indian River County.

2021

In the last 60 years, a total of \$72,139,051 has been raised to help everyone in Indian River County thrive.





COMMUNITY LEADER'S BREAKFAST

PAGE 13

"Since the pandemic hit 18 months ago, your United Way has been working overtime to help our community. With your support, we have raised, leveraged, and distributed more than \$5.2 million for this crisis response work." –Jeff Schlitt, Board Chair

After a brief hiatus due to the pandemic, friendly faces of regular campaign supporters gathered virtually, thanks to our Presenting Sponsor, Florida Power & Light Company. Keynote speaker Jeff Johnson, State Director of AARP Florida, discussed the importance of making communities more livable for all ages.

The Prize Patrol, hosted by Board Chair-Elect, Jeff Petersen, had the esteemed privilege of recognizing the Richardson Spirit of Indian River County Award winners by surprising them at their places of business.



COMMUNITY LEADER'S BREAKFAST

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These prestigious awards were presented to the following honorees for making a notable difference in our community:

- The Richardson Spirit of Indian River County Award for Workplace Campaign: *School District of Indian River County*
- The Richardson Spirit of Indian River County Award for Partner Agency Workplace Campaign: *Substance Awareness Center of Indian River County*
- The Richardson Spirit of Indian River County Award Community Champion: *Jeremy Odom*
- Ralph T. King Award: Jeff Smith





Typically, the largest one-day volunteer event in Indian River County, pivoted again to small, socially distanced groups to adhere to safety protocols.

While the teams may have been small, the task was monumental – 1,000 hygiene kits were packed and delivered to unhoused children living in our community. Thanks to our sponsors, Publix, Inc. and McDonald's, each backpack included shampoo, soap, a toothbrush, toothpaste, floss, sponges, deodorant, hair gel, and hand sanitizer.

DID YOU KNOW?



PAGE

423 students are homeless in Indian River County. Plus 250 more students are considered to be "couch surfing."*

*This data is often significantly under represented, due to family concerns of repercussions.

WORKPLACE CAMPAIGNS

PAGE

Workplace giving is an easy and effective way for employees to make a difference and show them their workplace is actively supporting their local community's most important issues.

Employees of a company are given an opportunity to support United Way of Indian River County (UWIRC) by donating via payroll deduction, cash, or check.

These employees' investments benefit the entire community, not just one program, issue, or population, and this leads to a stronger, more sustainable place to live and work.

UWIRC provides expert management of donor investments and brings the right people, ideas, and resources together to solve the most pressing needs of the community and finds innovative solutions for lasting change.

Sawbones VS. Jawbones Softball Tournament –

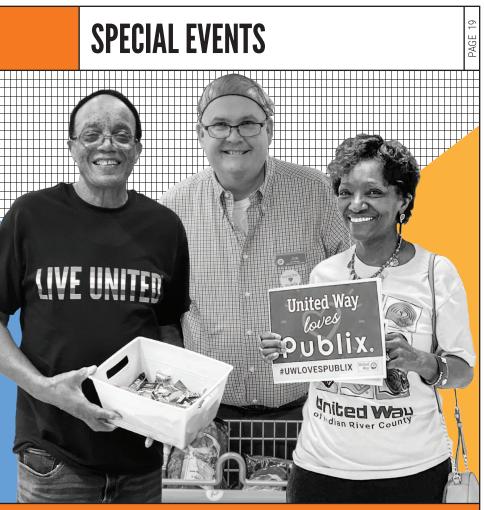
Local professionals give back to their community at the annual Sawbones VS. Jawbones softball tournament presented by Cleveland Clinic Indian River. The doctors vs. lawyers rivalry continued for the 11th year at the newly renovated Holman Stadium at the Jackie Robinson Training Complex, raising nearly \$8,000 for United Way and the community.



WORKPLACE CAMPAIGNS

All-Rite Water Purification AT&T AYS Employee Leasing Bank of America Best Buy Store #816 Boys & Girls Clubs of IRC Camp Haven Childcare Resources of Indian River Children's Home Society City of Fellsmere City of Sebastian City of Vero Beach **Cleveland Clinic Indian River** Croom Construction Crossover Mission Cumberland Farms Dillard's Department Stores, Inc. Disney's Vero Beach Resort Drug Abuse Treatment Association, Inc. **Economic Opportunities Council** Elliot Merrill Community Management Federal Express Corporation Fellsmere Farms Florida Floor Fashions Florida Power and Light Company George E. Warren Corporation Gifford Youth Achievement Center Gould Cooksey Fennell HealthSouth Hibiscus Children's Center Indian River County IRC Clerk of the Circuit Court IRC Healthy Start Coalition IRC Property Appraiser's Office IRC School District IRC Sheriff's Office IRC Supervisor of Elections Jacoby and Handley, PLLC John's Island Real Estate Kmetz, Elwell, Graham & Assoc., CPA's Law Offices of Jennifer Peshke

Literacy Services of IRC Marine Bank Mental Health Association in IRC Mental Health Collaborative Northern Trust Nylacarb Corporation Piper Aircraft, Inc. PNC Advisors Proctor Construction Publix Super Markets, Inc. Raymond James & Associates Redlands Christian Migrant Association Regency Windsor Management, Inc. Rehmann Riverside Theatre Rossway Swan Tierney Barry Lacey & Oliver, P.L. SafeSpace Samaritan Center Schlitt Services Seacoast Bank SouthState Bank Space Coast Credit Union Spiezle Architectural Group, Inc. Substance Awareness Center SunTrust Bank Target TD Bank The Arc of Indian River County, Inc. The Hill Group Town of Indian River Shores Treasure Coast Community Health Tykes & Teens United Parcel Service Vero Insurance Veterans Council of Indian River County Visiting Nurse Association Walmart Wells Fargo Wilmington Trust, N.A. Windsor (Torwest) Youth Guidance



Publix Appreciation Week -

Whether it's lending a hand to carry a heavy bag for an elderly neighbor, packing groceries for delivery to those who feel safer at home, or continuing to show up on the front lines throughout the pandemic – grocery workers are there to support us.

Every year, we celebrate United Way Worldwide's No. 1 Global Corporate Leader, Publix Super Markets, Inc. Publix associates collectively create a major impact for local United Ways within their 7-state footprint. They truly LIVE UNITED by giving their time, talents, and treasures to our local communities.



Pinwheels for Prevention -

In April, we participated in the Child Abuse Prevention Campaign, Pinwheels for Prevention. Across the Treasure Coast, struggling families have access to people and organizations who will work with them to build these capabilities and lift their families.

United Way invests in local solutions to prevent child abuse through nonprofit agencies with established best practices, such as Healthy Families Florida, IRC Healthy Start Coalition, Safe Families for Children, and Childcare Resources. As a community, we are helping to improve parenting skills, counseling, support, and connections to a host of resources.



Golf Sponsors –

JBT Food Tech Bernard Egan Foundation Perfect Stix, LLC Complete Electric, Inc. CED Vero SouthState Bank Rehmann Schlitt Services The Hill Group Nelson Morgan Fessler Petersen Wealth Management IRSC Foundation, Inc. Jeremiah's Italian Ice of Vero Beach Northern Trust TC Enterprises of the Treasure Coast George E. Warren Corporation Barker Air Conditioning & Heating Plant Food Systems, Inc. Comcast Business JR Land Management LLC Lulich & Attorneys, P.A. STAR Technology The Wawa Foundation Florida Floor Fashions Law Offices of Robert C. Nall Smoke Inn Cigars Vero Beach Jones and Jones Advertising Gould Cooksey Fennell, PLLC

CITRUS GOLF TOURNAMENT

Over the past thirty-five years, the Citrus Golf Tournament has largely contributed to our campaign goals raising a combined total of over \$600k. In spite of this years stormy weather, it was a great day out on the greens. Every dollar raised by the tournament is invested in programs that have a direct and measurable impact on the community.



CAMPAIGN SPONSORS



Torchbearers -

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

Elite Campaign Sponsors –

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EVENT SPONSORS



Volunteer Income Tax Assistance (VITA) Program Sponsors –

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In-kind Sponsors -

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ALEXIS DE TOCQUEVILLE SOCIETY

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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.

Donations received from July 1, 2021 - June 30, 2022.

We greatly appreciate each gift given in support of United Way and have made every effort to ensure the accuracy of this listing. Please notify us of any inaccuracies or omissions. We regret any errors.

Ordre D'Égalité (\$50,000-\$74,999)

Edward and Sherry Ann Dayton

Jim and Jean Kelly

Ordre De Liberté (<u>\$25,000-\$49,999)</u> -

Duane and Dorothy Bluemke Chris and Keena Clifford Barbara D. Hauptfuhrer, in memory of Bob Betty MacMillan Raymond J. and Sonia McGowan Edward and Dawn Michael Jack and Mollie Rogers Mr. and Mrs. O. Griffith Sexton King and Dace Stubbs Mrs. David K. Welles, Sr. Bernard A. Egan Foundation, Inc.

ALEXIS DE TOCQUEVILLE SOCIETY

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Silver Circle (Continued) –

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Ms. Cheryl Sangbush James Savoie Jeff and Cassie Schlitt Bob Schlitt Jr. Mr. and Mrs. James E. Schneithorst Schommer Properties Carolyn and Bill Schrader John and Kathi Schumann Sara and Axel Schupf Warren and Virginia Schwerin Mrs. John C. Scully Linda and Peter Seed Andrew and Tracey Segal Mr. and Mrs. Andrew Senchak Mike Sepesy Jerry and Mary Rita Sheehan Mrs. Charles V. Sheehan Mr. and Mrs. Fred Shriner Ben Sidorski Jordan and Meredith Sihombing Sandy and Tom Slaughter Sandy and Crosby Smith Wanda and Jeff Smith Mr. and Mrs. Joseph E. Smith Mr. Robert L. Smith and Ms. Patricia L. Sawyer Scott Smith Peter and Susan Solomon Family Foundation Dr. and Mrs. J. Clyde Spencer, M.D. L. P. Sperry, Jr. Karla and John Spooner Michael and Doreen Sproule Mr. Eric Stang Diane and Norval Stephens Carl W. Stern and Holly Hayes Mr. and Mrs. Gordon Stewart Mr. and Mrs. Thomas Stever Mr. Joe Stone, Jr.

Byron and Nancy Sugahara Peter and Terry Sullivan Mr. and Mrs. William Sullivan, III Mr. and Mrs. Jeffrey Surprenant Leslie & Mike Swan Mr. Stephen Taylor Linda and Mel Teetz Doug Theall Gerry Thistle Lois and Jim Thompson, in honor of J.A "Coach" Thompson* Tom Tierney and Lisa Kahle Mrs. James W. Titelman Mr. and Mrs. William Tobin Dr. and Mrs. Richard Tompkins Ms. Latonya Troublefield Kara J. Turner Ralph and Ann Turner Mrs. Agnes C. Underwood Ashley Lynn Upchurch Mr. Robert Valentin Linda Walton Mr. and Mrs. Stephen H. Warhover Mr. and Mrs. Ronald Watkins Mr. Douglas K. Watson and Ms. Susan Hunter Mr. Joseph Wauters Jr. Ms. Brooke Weisman Mr. Kenneth L. Wessel Richard and Marsha Wheeler Herb and Nancy Whittall Tiffany L. Wilder Robert Williams and Karen Katen Dave and Bonnie Wilson Andrew and Leigh Wirth Dr. and Mrs. Marsh Youngbluth Judy and Allen Zern Jerry and Ellen Zollenberg * Deceased

UNITED WAY FOUNDATION

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 to generate 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.

At the beginning of 2021, the United Way Foundation had \$5.56 million in assets under management with another \$6.1 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 the United Way Foundation, at (772) 569-6777.

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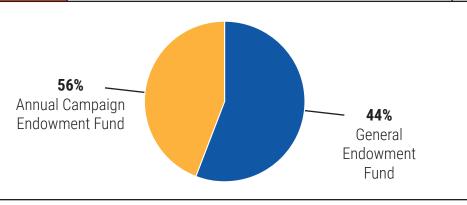
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ENDOWMENT FUNDS



ASSETS

PAGE

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. PAGE 34

General Endowment

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

INCOME Contribution Investment Return, Net	\$177,394 (\$657,863)
TOTAL Public Support & Revenue	(\$480,469)
EXPENSES Community Support Services Endowment Operations	\$109,554 \$113,737
Total Expenses Changes in Net Assets Net Assets, Beginning of Year Net Assets, End of Year	\$223,291 (\$703,760) \$5,537,175 \$4,833,415

FOUNDATION DONORS

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 David and Betsy Sams 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 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

FOUNDATION DONORS

Legacy Society Continued -

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L.W. Appleby Revocable Trust 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 Robert R. Elser and Mary Lou Commerford P. Ross Cotherman, CPA D. Lorne and Jane R. Coyle Carol Crittenden Mr. and Mrs. William C. Cummings Marybeth and Chuck Cunningham Oscar H. and Helen L. Curry Curtis Ward & Associates PA Dr. and Mrs. William M. Cutler Alice and Rene Donars Mr. and Mrs. Hamilton R. Duncan Mrs. Stewart A. Dunn Mr. and Mrs. David W. Edwards Robert R. Elser and Mary Lou Commerford

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FOUNDATION DONORS

Legacy Society Continued -

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FOUNDATION DONORS

Legacy Society Continued -

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

Memorial Gifts –

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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 working in advancing the common good here in Indian River County.

Louis Allocca Elliot A. Baines Jesse Loy Baldwin Kathleen Branca Elmer T. Browne Margot Coleman Dorothy Coufos Archie T. Croteau Mr. Charles E. Davis, Jr. Olga Draper Ellen Ann Dunham J.B. Egan III Charles V. Fenn Thomas Fratar Lynn Hall Bill Hamlin Hayden Harlow Doris Hardesty Mabel B. Harris Mr. Forrest Haselton Mr. and Mrs. William B. Howell Benjamin Jagues Charles R. Johnson Ruth Karpf Ray Kempkin Ralph King Thomas A. Lewis Jon W. Ludwig

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Our Mission

[To improve lives by mobilizing the caring power of our community.]

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