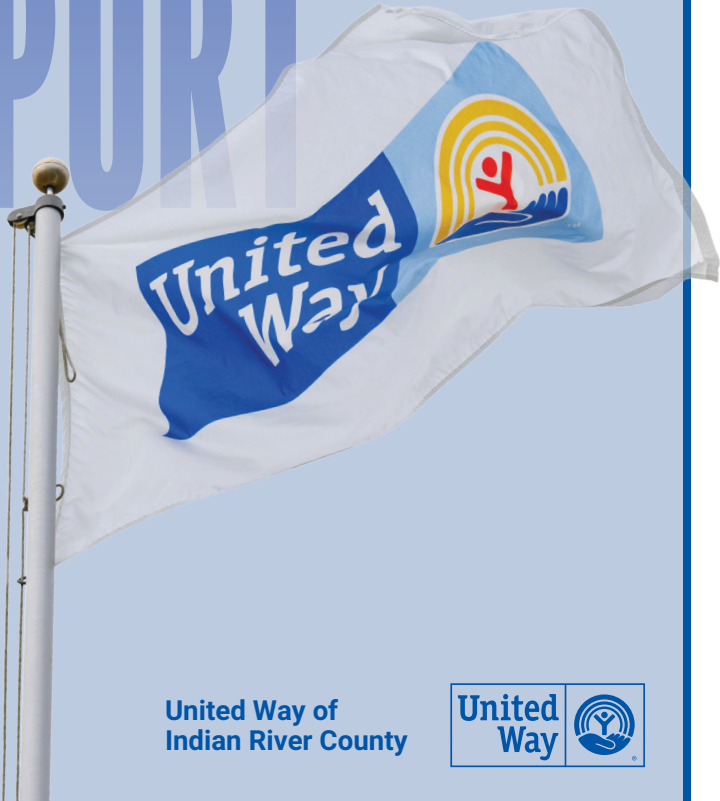


# COMMUNITY IMPACT REPORT

22  
—  
23



United Way of  
Indian River County



## BOARD OF DIRECTORS

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Deana Shatley, *Director of Community Impact*  
Sydney Mihailoff, *Relationship Development Manager*  
Stacy Benezra, *Community Impact Coordinator*  
Nate Bruckner, *Strategic Project Specialist*  
Annette Yost, *Accounting Clerk*  
Cindy Carr, *Development Associate*  
Miguel Saldana, *Community Engagement Associate*  
Your Part-Time Controller, *External Finance Department*

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## A WORD FROM LEADERSHIP

This year you rose to the occasion, uniting with us to help those who need it most. With your support, we were able to begin addressing the housing crisis and launch the public-private Access to Justice program. As your trusted convener, we brought together stakeholders with diverse perspectives and interests to move them towards common ground and shared purpose.

Together, we brokered partnerships and connected these stakeholders in meaningful ways. In pursuit of a better community, your support was a true testament to the caring spirit that runs deep in Indian River County and helped us raise more than \$2 million this past fiscal year. Powered by your contributions, we have poured passion into solving new problems in innovative ways, energized around our key initiatives and vital, foundational work.

Our purpose has always been – and will always be – people. We unite to solve challenges and improve lives. Guided thoughtfully by our dedicated Board of Directors, United Way of Indian River County has continued to deliver results, even when we face hard times. This year, a shifting economy with skyrocketing prices and inflation created financial challenges for local families, adversity for students and precarious living conditions for neighbors at risk of or already experiencing homelessness.

Although some barriers seem entrenched, and new challenges keep emerging, your incredible generosity is making a meaningful difference. None of what you will read in the following pages would be possible without your support. We hope the work we are doing uplifts and inspires your purpose. Thank you for being a driving force of local change. We look forward to continuing our work together to improve lives in our community.

In the year to come, we are developing bold plans to ensure we can harness the strength, compassion and shared determination of stakeholders to help others into the future. As we look forward, we know we'll be able to address the challenges ahead with the support of generous community members like you.

We are grateful for your partnership.



Jeffrey C. Petersen  
Board Chair



Meredith Egan  
Chief Executive Officer

# HEALTH

## **211 Palm Beach and Treasure Coast**

*211 Helpline*

## **Childcare Resources of Indian River County**

*Wellness & Early Intervention Program*

## **Drug Abuse Treatment Association**

*Norman C. Hayslip Treatment Center, Fort Pierce • Outpatient Program*

## **Indian River County Healthy Start Coalition**

*Babies & Beyond • Nurse Family Partnership*

## **Mental Health Association in Indian River County**

*Walk-In & Counseling Center*

## **Mental Health Collaborative of Indian River County**

*McCabe Connections Center*

## **Senior Resource Association**

*Adult Daycare Services • Meals on Wheels & Emergency Meals on Wheels*

## **Substance Awareness Center of Indian River County**

*Universal Prevention Program*

## **Suncoast Mental Health Center**

*Behavioral Health Services for Children*

## **The Arc of Indian River County**

*Behavioral Analysis Program*

## **Treasure Coast Community Health**

*Comprehensive Dental Services*

## **Treasure Coast Food Bank**

*Mobile Pantry*

## **Visiting Nurse Association of the Treasure Coast**

*Telehealth Chronic Disease Management*

# 1,170

SENIORS RECEIVED CARE  
+ HEALTHY MEALS



• **4,270** individuals received a mental health screening and treatment plan

• **8,506** individuals completed drug/alcohol prevention programs

• **8,119** individuals received dental and preventative services

# EDUCATION

## **211 Palm Beach and Treasure Coast**

*211 Helpline*

## **Big Brothers, Big Sisters of St. Lucie, Indian River & Okeechobee Counties**

*Community Based Mentoring • Passport to Early Literacy*

## **Boys & Girls Clubs of Indian River County**

*After School and Summer Programs*

## **Childcare Resources of Indian River**

*Subsidized High Quality Childcare*

## **Children's Home Society of Florida**

*Dodgertown Elementary Community Partnership School*

## **Crossover Mission**

*Academy for High Risk Student Academic Intervention*

## **Early Learning Coalition of Indian River, Martin & Okeechobee Counties**

*VPK Completers Program*

## **Economic Opportunities Council of Indian River County**

*Early Bird Program*

## **Education Foundation of Indian River County**

*STEP into Kindergarten*

## **Environmental Learning Center**

*Environmental Career Readiness Internship*

## **Gifford Youth Achievement Center**

*After School Education Program (ASEP)*

## **Hibiscus Children's Center**

*Career Pathways to Independence Program*

## **Indian River County Healthy Start Coalition**

*Parents as Teachers*

## **Redlands Christian Migrant Association**

*School Readiness Child Care for Infants & Toddlers*

## **The Learning Alliance**

*Family Connection Centers • Summer Programs*

## **Youth Guidance**

*Mentoring Academy*

**381**  
**CHILDREN ACCESS**  
**QUALITY EARLY LEARNING**

- **328** students were enrolled in mentoring programs
- **643** of students served by United Way programs performed on grade level
- **519** parents/caregivers fostered positive growth and development in their child through age-appropriate parenting



# FINANCIAL STABILITY

## **211 Palm Beach and Treasure Coast**

*211 Helpline*

## **American Red Cross, South Florida**

*Home Fire Prevention & Emergency Assistance*

## **Camp Haven**

*Pathways to Financial Stability*

## **Catholic Charities of the Diocese of Palm Beach**

*Samaritan Center for Homeless Families*

## **Children's Home Society of Florida**

*Transitional Living Program*

## **Hope for Families Center**

*Helping Homeless Families Achieve Success*

## **Literacy Services of Indian River County**

*Adult & Family Literacy*

## **SafeSpace**

*Shelter Advocacy Program*

## **Senior Collaborative of Indian River County**

*Senior Navigation Program*

## **The Arc of Indian River County**

*Supported Employment Program*

## **Treasure Coast Homeless Services Council**

*Homeless Resource Center*

## **United Against Poverty**

*Success Training Employment Program (STEP)*

## **Veterans Council of Indian River County**

*Upward American Veterans*

- **941** clients diverted from shelter or prevented from becoming homeless
- **286** clients increased financial literacy/knowledge or skills
- **488** clients increased soft skills (problem solving and other cognitive skills, oral communication skills, personal qualities, and work ethic)



# 178

**CLIENTS IMPROVED  
FINANCIAL SKILLS**

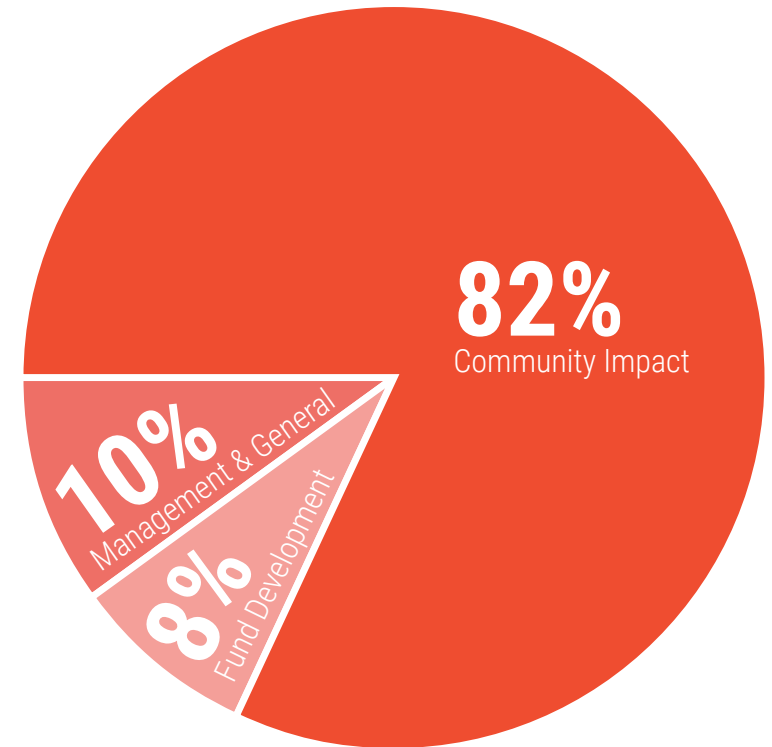
# YOUR INVESTMENT MATTERS

**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 2022-2023, 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.

**Total Community Investment:** \$1,739,299  
**Health:** \$569,862 **Education:** \$756,921 **Financial Stability:** \$412,516



## INCOME

Public Support & Revenue	\$3,261,598
Net Campaign Revenue	\$2,409,899
Community Response Fund	\$325,664
In-kind Contributions	\$94,424
Investments, Net	\$130,297
Other	\$301,314

## EXPENSES

Community Support Services	\$2,785,674
Campaign Fund Development	\$279,220
Management & General	\$344,343
Total Expenses	\$ 3,409,237
Changes in Net Assets	(\$147,638)
Net Assets, Beginning of Year	\$2,259,686
New Assets, End of Year	\$2,112,048

# MEET ALICE

**ALICE** which stands for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, could be someone close to you—a family member or a friend. You might even find yourself in the shoes of ALICE. Occupations like cashiers, waiters, child care providers, and many others form the backbone of our essential workforce, yet ALICE earners barely surpass the Federal Poverty Level, finding it challenging to cover their basic needs. Every day, these households confront impossible decisions due to financial strain. This struggle is widespread, with households of color disproportionately represented among ALICE demographics.

## **Did you know that 13% of Floridians live below the federal poverty level (FPL)?**

Over 1.1 million Floridians fall below the ALICE Threshold, the income necessary for household sustenance. In Indian River County alone, nearly 31,250 residents face the challenge of making ends meet. The annual household survival budget for an individual residing in Indian River County amounts to \$27,516.

ALICE also represents the data reshaping the dialogue on financial hardship, and a grassroots movement that is picking up steam across half of U.S. states - and counting.

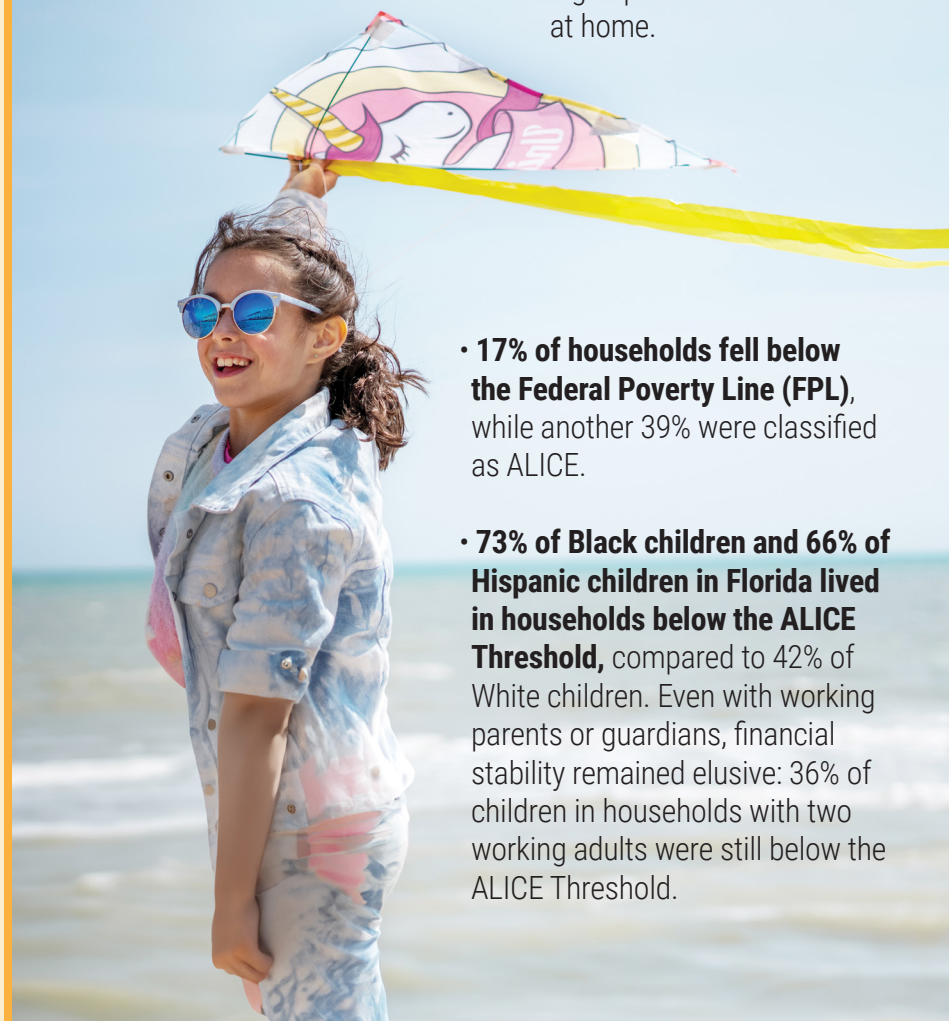
Access the United for ALICE Dashboard at [UnitedWayIRC.org/Alice](https://UnitedWayIRC.org/Alice).

**56%**  
**CHILDREN IN FLORIDA  
EXPERIENCED  
FINANCIAL HARDSHIP**

- **Children below the ALICE Threshold often lack access to resources** ranging from stable housing and public assistance to education and broadband services. Almost 1.5 million children below the ALICE Threshold in Florida did not participate in SNAP, and nearly 700,000 had no high-speed internet access at home.

- **17% of households fell below the Federal Poverty Line (FPL)**, while another 39% were classified as ALICE.

- **73% of Black children and 66% of Hispanic children in Florida lived in households below the ALICE Threshold**, compared to 42% of White children. Even with working parents or guardians, financial stability remained elusive: 36% of children in households with two working adults were still below the ALICE Threshold.



**23%**  
OF FLORIDA'S NEARLY  
1.4 MILLION VETERANS  
WERE ALICE

- **36% of American Indian/ Alaska Native, Black, and Hispanic veterans** in Florida lived below the ALICE Threshold, compared to 24% of Asian and 27% of White veterans.

- **57% of Florida veterans over 25 lacked postsecondary education.** Among high school graduates without post-secondary education, 35% were below the ALICE Threshold.

- **Veterans with disabilities in Florida faced increased financial strain,** with 36% living below the ALICE Threshold, compared to 26% of veterans living without disabilities.



**53%**  
OF FLORIDIANS  
WITH DISABILITIES  
EXPERIENCED  
FINANCIAL HARDSHIP

- **39% of Floridians under 65 with disabilities** and below the ALICE Threshold were not enrolled in Medicaid or Medicare.

- **In Florida, 59% of people with disabilities were not working,** compared to 18% of those without disabilities. Among full-time workers with disabilities, 31% earned below the ALICE Threshold.

- **For individuals aged 25+ with only a high school diploma or GED,** 54% of those with disabilities fell below the ALICE Threshold, compared to 42% without disabilities, regardless of education level.



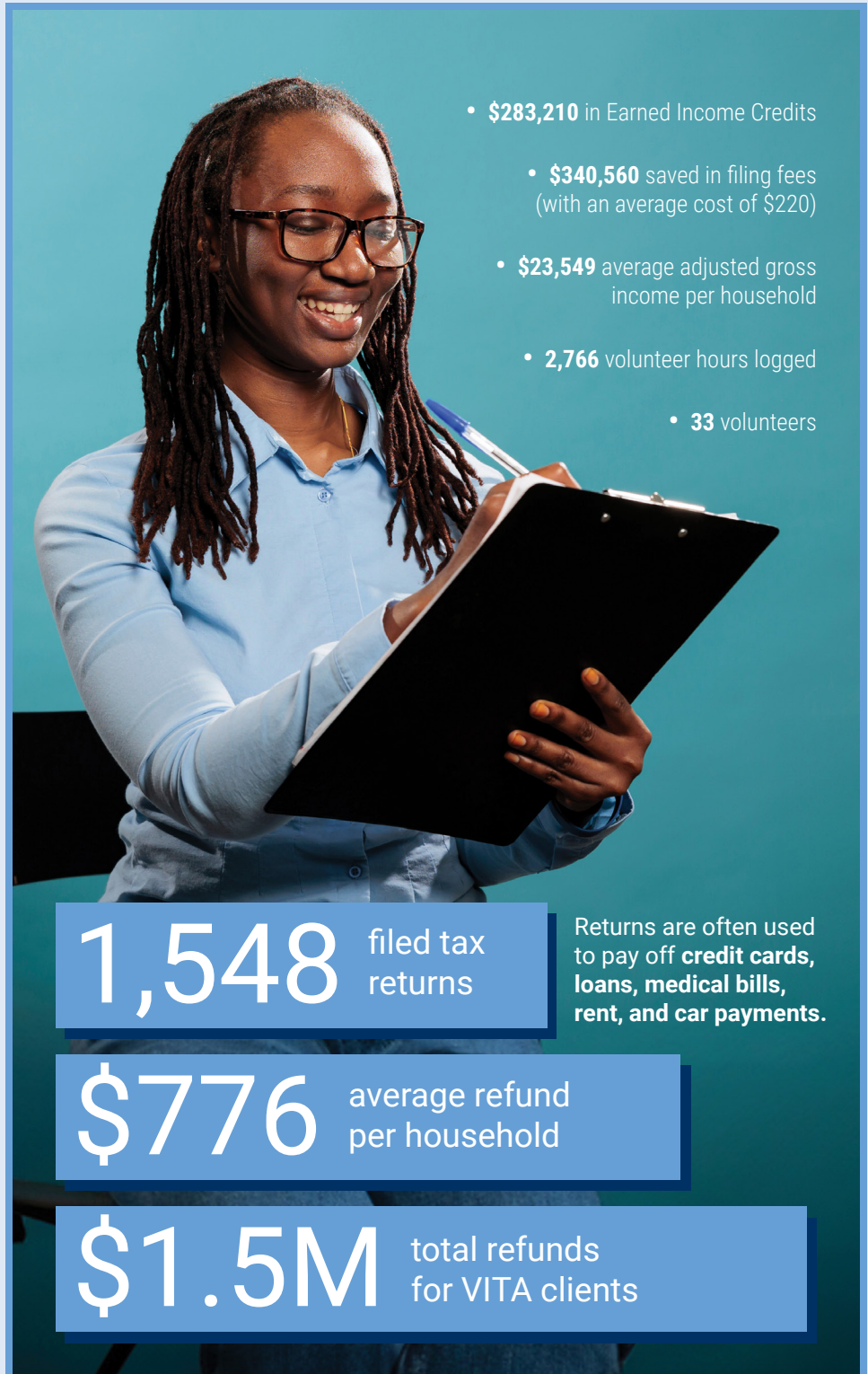


# VOLUNTEER INCOME TAX ASSISTANCE

The Volunteer Income Tax Assistance (VITA) program is a partnership between United Way and the IRS offered annually from January through Tax Day to assist families and individuals with low-to-moderate incomes prepare their tax returns for free. This year, thirty-three IRS-trained and certified volunteers ensured taxpayers received all the credits for which they were eligible and helped put an average refund of \$776 back into the pockets of Indian River County residents.

“We served more people this year than ever before, especially at a time when we know many households in our community faced financial hardships,” explained Meredith Egan, CEO, United Way of Indian River County. “It’s a milestone we’re really proud of and look forward to making that number grow each year.”

VITA Sponsors: Offutt, Barton, Schlitt, LLC and Kmetz, Elwell, Graham & Associates, CPA’s



- **\$283,210** in Earned Income Credits
- **\$340,560** saved in filing fees (with an average cost of \$220)
- **\$23,549** average adjusted gross income per household
- **2,766** volunteer hours logged
- **33** volunteers

**1,548** filed tax returns

Returns are often used to pay off **credit cards, loans, medical bills, rent, and car payments.**

**\$776** average refund per household

**\$1.5M** total refunds for VITA clients

# COMMUNITY LEADERS' BREAKFAST

## ANNUAL COMMUNITY LEADERS' BREAKFAST

On October 20th, the annual Community Leaders' Breakfast celebrated community leaders, volunteers, and the cause of affordable housing. Sponsored by Florida Power & Light Company, the event featured guest speaker, David Hall, a Florida Housing Finance Corporation Board Member, and Associate Broker with Coldwell Banker Residential Real Estate, who discussed the housing challenges faced by the ALICE population (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed).

Meredith Egan, CEO of United Way of Indian River County, emphasized the importance of addressing affordable housing through strategic partnerships. David Hall shared insights into state-level legislation and innovations related to housing. Florida Housing has financed twenty-two affordable housing developments in Indian River County, providing over 2,400 units, and the Florida Legislature has allocated \$100 million for the Florida Hometown Heroes Housing Program.



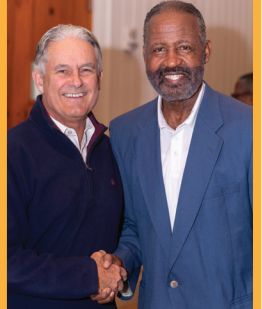
### RICHARDSON SPIRIT OF INDIAN RIVER COUNTY AWARD RECIPIENTS

Ralph T. King  
Lifetime Achievement Award  
Margo Lind

Agency Excellence Award  
Children's Home Society of Florida

Award of Special Recognition  
Nicholas LoPresti,  
LoPresti Productions

Award of Continuous Support  
Cleveland Clinic Indian River Hospital



# SPECIAL EVENTS

## CITRUS SALE

For over 20 years, United Way's Annual Citrus Sale has been a staple in our community for customers to send sunshine to friends and family across the US while supporting a good cause. This fundraising event wouldn't have been possible without the generosity of our local packing houses that donated navel oranges and ruby red grapefruits. This holiday fruit sale generated \$9,193 to support our funded partners.



## SEAHORSE LANE BOUTIQUE

A portion of Vero Initiative proceeds benefit different non-profit organizations on a quarterly basis and we were the lucky Q4 recipients - raising \$772.



## SOUTHERN SOCIAL

We were fortunate to receive \$1,235 as Q4 recipients of the Cocktail for a Cause proceeds, which contribute to various organizations every quarter.



## PUBLIX APPRECIATION

Annually, Publix Super Markets, Inc., a top Global Corporate Leader at United Way Worldwide, significantly impacts local United Ways across 8 states, embodying the "LIVE UNITED" spirit through their dedication of time, skills, and resources to our communities.



## CUP O' JOE WITH THE CEO

Our Cup O' Joe with the CEO meet-up brings together donors, partners, volunteers, workplaces, and sponsors for complimentary coffee, fostering connections and discussions about our shared mission for a thriving Indian River County.



## PINWHEELS FOR PREVENTION

In April, we participated in Pinwheels for Prevention, a Child Abuse Prevention Campaign. United Way funds local agencies to enhance parenting skills, counseling, and support for struggling families on the Treasure Coast.

# DAY OF CARING

## 27TH ANNUAL DAY OF CARING

United Way's 27th Annual Day of Caring, the Treasure Coast's largest one-day service event, brought together nearly 1,000 volunteers from various organizations in Indian River County on October 15. Sponsored by Publix Super Markets, the event saw over 950 volunteers completing 57 projects for nonprofits like Children's Home Society, Crossover Mission, and The Arc.

Starting at Vero Beach High School, volunteers enjoyed breakfast donated by Natalie's Orchid Island Juice and McDonald's, and lively routines by the Vero Beach High School Cheerleaders and TBLB Fitness. From painting to assembling literacy kits for Head Start, sponsored by PNC Grow Up Great, the community's collaborative effort aimed to make Indian River County healthier and stronger. CEO, Meredith Egan, underscored the importance of assisting community members facing hardships.



# CITRUS GOLF

## 37TH ANNUAL CITRUS GOLF TOURNAMENT

Our 37th Annual Citrus Golf Tournament took place on June 17th at Grand Harbor Golf and Beach Club and successfully raised funds to support crucial community programs and services. Co-chaired by Rusty Banack and Martin Bierley, the tournament started as a way for citrus and agricultural businesses to support United Way raising \$21,184 this past year.

### CITRUS GOLF SPONSORS

Barker Air Conditioning  
Bernard A. Egan Foundation  
Complete Electric, Inc.  
Florida Floor Fashions  
Gould Cooksey Fennell, P.A.  
Jeremiah's Italian Ice of Vero Beach  
Kmetz, Elwell, Graham  
& Associates, CPA's  
Lulich & Attorneys  
Marine Bank  
Massey Romans Capital  
Nelson Morgan Fessler Petersen  
Merrill Lynch

Northern Trust  
Orchid Island Brewery  
Oslo Packing Company  
Perfect Stix  
Plant Food Systems  
Rehmann  
Rossway Swan Tierney Barry & Oliver, PL  
Schlitt Services  
Sexton Palms  
The Beach Shop  
The Hill Group  
Vero Beach Social Media  
WaWa Foundation



# TRIKE WARS

## THANK YOU CELEBRATION & BLOCK PARTY

Our Inaugural Trike Wars went off without a hitch as sponsors raced for the coveted championship! Teams from Torchbearer Workplaces, those who have pledged \$12,000 in employee and corporate donations, were eligible to compete. Ultimately, Team Publix put their tricycle riding skills to the pavement and took home the gold.

The Thank You Celebration and Block Party marks the end of United Way's Annual Campaign and recognizes the volunteers, donors, workplaces, funded partners, and community for supporting its mission.

## TRIKE WARS SPONSORS

Grand Prix Sponsor: Gould Cooksey Fennell, P.A.

Pit Crew Sponsors: AMAC, Northern Trust, The Hill Group, and Offutt, Barton, Schlitt, LLC

## TRIKE WARS TEAMS

Dean Mead Minton & Moore, Gould Cooksey Fennell, P.A., IRC Sheriff's Office, Nelson Morgan Fessler Petersen Merrill Lynch, Northern Trust, Publix Super Markets, School District of Indian River County



# POWERED BY PURPOSE

## **SPEAKER SERIES**

The Powered by Purpose series features community leaders and experts speaking about different topics of interest to help attendees learn more about an issue, community challenges, collaborations, resources and ways to get involved.

The Meet the Funders event commenced with presentations from nine local organizations detailing their grant application procedures. Subsequently, the focus shifted to Mental Health, featuring prominent speakers Dr. Philip Cromer, Brett Hall, LCSW, MBA, and Anne W. Posey, LMHC, NCC. The segment on Human Trafficking and Child Abuse was led by Karissa Bolden, Caryn Toole, and Sarah Marie Henry. The concluding Powered by Purpose session, titled Meet ALICE, featured a panel discussion with community leaders Jeffrey Pickering, Dori Stone, and Trevor Loomis.



# CAMPAIGN & SPONSORS

## **TORCHBEARER SPONSORS (\$12,000+)**

Bernard A. Egan Foundation  
Dean Mead Minton & Moore  
Florida Floor Fashions  
Nelson Morgan Fessler Petersen  
Merrill Lynch  
Publix Super Markets

Cleveland Clinic Indian River Hospital  
Gould Cooksey Fennell, P.A.  
Northern Trust  
Indian River County  
School District of Indian River County

## **ELITE SPONSORS (\$500)**

AMAC  
Armfield Wagner, Inc. Appraisers  
AYS Employee Leasing  
Florida Power & Light Company  
Graves Brothers Company

Kmetz, Elwell, Graham & Associates, CPA's  
Marine Bank  
Schlitt Services  
SouthState Bank  
USI Insurance Services

## **IN-KIND SPONSORS**

Countryside Citrus  
CVS Distribution Center  
DLF Packing  
Egan Fruit Company  
EverGreen Media  
Gould Cooksey Fennell, P.A.  
Hometown News  
Jones & Jones Advertising, Inc.  
LoPresti Productions  
McDonald's  
Natalie's Orchid Island Juice

Perfect Stix  
Rio Citrus  
Riverfront Packing Company  
TBLB Fitness  
TCPalm  
The Ad Agency  
The Beach Shop  
Thelma Jean's Bakery  
Treasure & Space Coast Radio  
Vero Beach 32963

## **WORKPLACE CAMPAIGN PARTNERS**

*A Workplace Campaign is an easy and effective way for employees make a difference by donating via payroll deduction, cash, or check. These employees are making an investment that benefits Indian River County – not just one program, issue, or population. These donations achieve results that no one can accomplish individually. This past year over 60 workplaces ran a campaign, generating 20% of our annual campaign.*

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 Hospital  
Croom Construction Company  
Dean Mead Minton & Moore  
Dillard's Department Stores, Inc.  
Drug Abuse Treatment Association, Inc.  
Economic Opportunities Council  
Elliot Merrill Community Management  
Encompass Health  
Enterprise Holdings Foundation  
Federal Express Corporation  
Fellsmere Farms  
Florida Floor Fashions  
Florida Power & Light Company  
George E. Warren Corporation  
Gifford Youth Achievement Center  
Gould Cooksey Fennell, P.A.  
Indian River County  
IRC Clerk of the Circuit Court  
IRC Healthy Start Coalition  
IRC Property Appraiser's Office  
IRC Sheriff's Office  
IRC Supervisor of Elections Office  
Jacoby and Handley, PLLC  
John's Island Real Estate Company

Kmetz, Elwell, Graham  
& Associates, CPA's  
Law Offices of Jennifer D. Peshke  
Littelfuse  
Mental Health Association  
Northern Trust  
Nylacarb Corporation  
Piper Aircraft, Inc.  
PNC Advisors  
Proctor Construction Company  
Publix Super Markets  
Raymond James & Associates  
Redlands Christian Migrant Association  
Regency Windsor Management, Inc.  
Rehmann  
Ring Power Corporation  
Riverside Theatre  
Rossway Swan Tierney Barry & Oliver, P.L.  
Samaritan Center  
Schlitt Services  
School District of Indian River County  
Seacoast Bank  
SouthState Bank  
Space Coast Credit Union  
Spiegle Architectural Group  
Substance Awareness Center  
Suncoast Mental Health Center  
Target  
The Arc of Indian River County, Inc.  
The Hill Group  
Treasure Coast Community Health  
United Way of Indian River County  
Visiting Nurse Association of the TC  
Windsor (Torwest)  
Youth Guidance Mentoring Academy

## **WORKPLACE PLEDGE**

*Please contact Sydney Mihailoff at (772) 567-8900, ext. 117 to become a partner.*



# ALEXIS DE TOCQUEVILLE SOCIETY

**With an annual gift of \$10,000 or more, Alexis de Tocqueville members are creating a profound and lasting impact throughout Indian River County. Donations received from July 1, 2022 - June 30, 2023.**

## **ORDRE D'ÉGALITÉ (\$50,000 - \$74,999)**

Edward and Sherry Ann Dayton                      Jim and Jean Kelly

## **ORDRE DE LIBERTÉ (\$25,000 - \$49,999)**

Duane and Dorothy Bluemke Foundation      Jack and Mollie Rogers  
A. James & Alice B. Clark Foundation      Marlynn and Bill Scully  
Chris and Keena Clifford                      Mr. and Mrs. O. Griffith Sexton  
Bernard A. Egan Foundation, Inc              King and Dace Stubbs through the  
Betty MacMillan                                      Indian River Community Foundation  
Raymond J. and Sonia McGowan              Mrs. David K. Welles, Sr.  
Edward and Dawn Michael

## **MEMBRES DE LA SOCIÉTÉ (\$10,000 - \$24,999)**

One Anonymous Donor                      Virginia and Timothy Beaulac  
Norman and Ann Baker                      Mrs. Herman F. Becker  
Mr. and Mrs. Andrew P. Barton, Jr.      Bill and Mary Ann Becker

*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.*

## **MEMBRES DE LA SOCIÉTÉ (CONTINUED)**

William and Marcia Blackburn              Mrs. Fred Kasten  
Fritz and Gay Blaicher                      Ted and Debbie Kelly  
Don and Mary Blair, The Blair              Ralph T. King  
Family Foundation                              Mr. and Mrs. John La Duc  
Barbe Bonjour Pike                              Susie and Bill MacDonald  
William and Beata Brewster                  Dennis and Karen Marlo  
Mr. and Mrs. Theodore W. Brickman, Jr.      Marilyn P. McConnell  
Mr. Richard J. Canty and                      Betty and Jim McDonald  
Ms. Hope B. Woodhouse                      Guy and Kacy Mitchell  
Wendy and Chase Carey                      John E. Moore, III, and  
John and Marlene Childs                      Lee Robinson Moore  
Amy and Cecil Conlee                          Charles and Susan Moritz  
Jane and Lorne Coyle                          Chad and Lisa Morrison  
Mr. and Mrs. Edward E. Crutchfield          Sharon and David Northrup  
Marybeth and Chuck Cunningham          Mr. and Mrs. Thomas H. O'Brien  
Gary and Donna Davis                          Jake Owen Foundation  
John H. and Susan Dobbs                      Jeffrey Petersen and Maria Segura  
David and Harriet Dyer                          Ed and Jan Pillard  
Dennis and Ellen Ferro                          Michael and Anne Rhoads  
Janet I. & H. James Field, Jr. Fund          Marjorie Hopwood Richardson and  
Bill and Laura Frick through the Indian      Danforth Kidd Richardson  
River Community Foundation                  Don and Patsy Riefler  
Richard J. Greene                              Sandy and Randy Rolf  
Mr. and Mrs. Bruce L. Hammonds              Lauren and John Roth  
Susan and Paul Hanson                          Susan and Larry Salustro  
Barbara D. Hauptfuhrer, in memory of Bob      David and Betsy Sams  
Skip and Pat Hauser, Hauser                  Anna Bain Slater  
Family Foundation                              Mr. and Mrs. Andrew R. Taylor  
Robert B. and Janet A.                          Judith and Andrew Tucker  
Hoffman Foundation                              Mr. Gilford B. Walker,  
J.M. Hopwood Charitable Trust                  Camp Younts Foundation  
The Hultquist Foundation                      Robert & Sheila Washburn  
Mr. and Mrs. Henry K. Justi                      Michael and Susan White  
The Kahle Foundation                          Joan Woodhouse

## **DIAMOND CIRCLE (\$7,500 - \$9,999)**

Four-Four Foundation, Inc.                      Mr. Paul Pronsny, Jr.  
Jay and Linda Knoll                              Mr. and Mrs. Robert N. Wolpe  
Gary Phillips

## **PLATINUM CIRCLE (\$5,000 - \$7,499)**

Steve and Lucia Bailey                          Ms. Carole Beecher Brown  
Mrs. Barbara Baldwin                          Mary L. Casey  
Susan and Dick Bergeman                      Mr. and Mrs. Jonathan M. Clark

**PLATINUM CIRCLE (\$5,000 - \$7,499)**

Mr. and Mrs. H. Richard Coleman  
 Mr. and Mrs. John F. Curley  
 Andrew and Betsy Forrester  
 Mr. and Mrs. Bernard M. Freeman  
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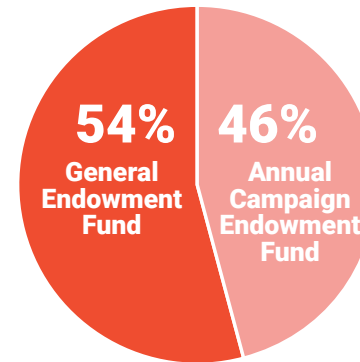
# UNITED WAY FOUNDATION

United Way Foundation of Indian River County, Inc. is a separate non-profit 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.

At the beginning of 2022, the United Way Foundation had \$5 million in assets under management with another \$6.2 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 United Way of Indian River County.

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) 567-8900 x121.

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



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## 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	\$147,000
Investment Return, Net	\$584,614

## TOTAL

Public Support & Revenue	\$731,614
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## EXPENSES

Community Support Services	\$152,126
Endowment Operations	\$77,036

Total Expenses	\$229,162
Changes in Net Assets	\$502,452
Net Assets, Beginning of Year	\$4,833,415
Net Assets, End of Year	\$5,335,867

## **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.*

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*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.*

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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  
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Kathleen Branca  
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*For more information about endowing a gift to the Foundation, please contact Jessica Schmitt, CFRE, Director of Philanthropy at (772) 567-8900, ext. 121 or [Jessica.Schmitt@UnitedWayIRC.org](mailto:Jessica.Schmitt@UnitedWayIRC.org)*



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**Our Mission**

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



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