

United Way of Indian River County



BOARD OF DIRECTORS

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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

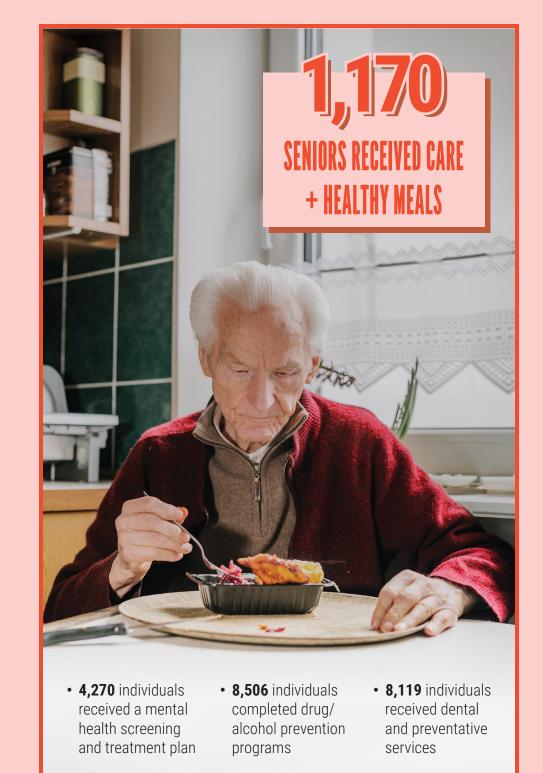
Comprehensive Dental Services

Treasure Coast Food Bank

Mobile Pantry

Visiting Nurse Association of the Treasure Coast

Telehealth Chronic Disease Management



EDUCATION

211 Palm Beach and Treasure Coast

211 Helpline

Big Brothers, Big Sisters of St. Lucie, Indian River & Okeechobee CountiesCommunity 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

328 students were enrolled in mentoring programs

• **643** of students served by United Way programs performed on grade level

CHILDREN ACCESS
QUALITY EARLY LEARNING

 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

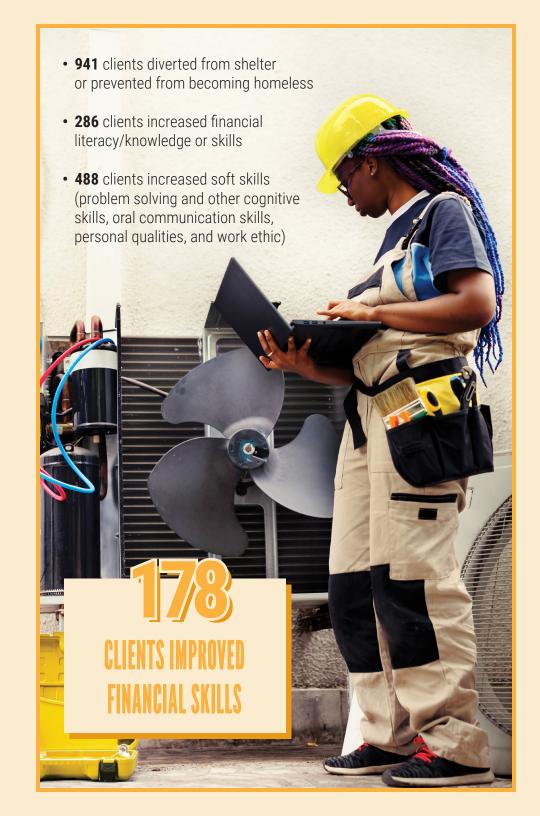
Homeless Resource Center

United Against Poverty

Success Training Employment Program (STEP)

Veterans Council of Indian River County

Upward American Veterans



YOUR INVESTMENT MATTERS

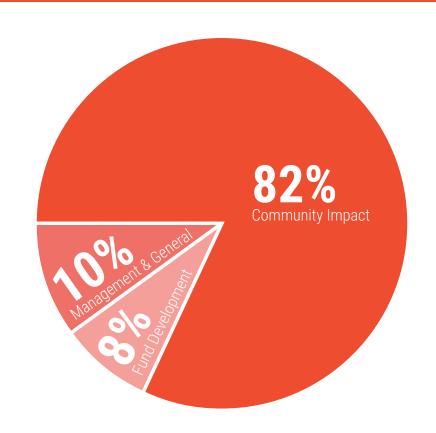
To effectively address our community's most persistent problems, we must have an organized, proven strategy.

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

\$3,261,598
\$2,409,899
\$325,664
\$94,424
\$130,297
\$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

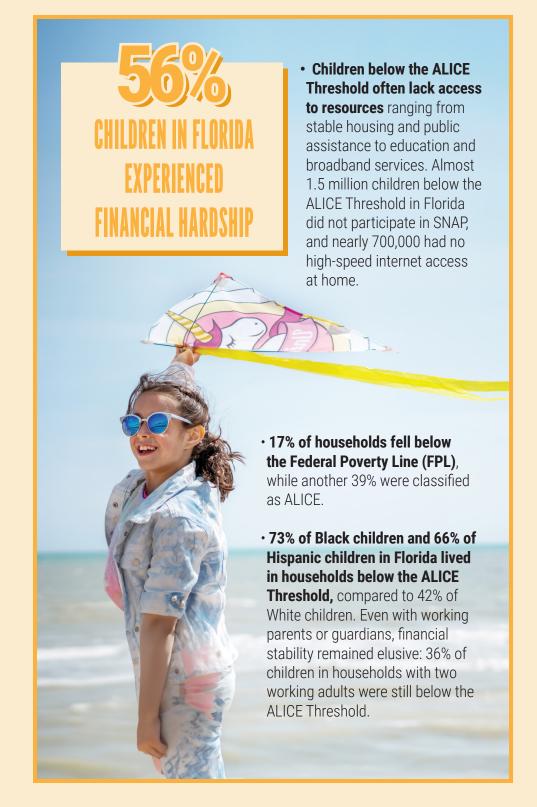
ALICE which stands for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, could be someone close to you—a family member or a friend. You might even find yourself in the shoes of ALICE. Occupations like cashiers, waiters, child care providers, and many others form the backbone of our essential 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.

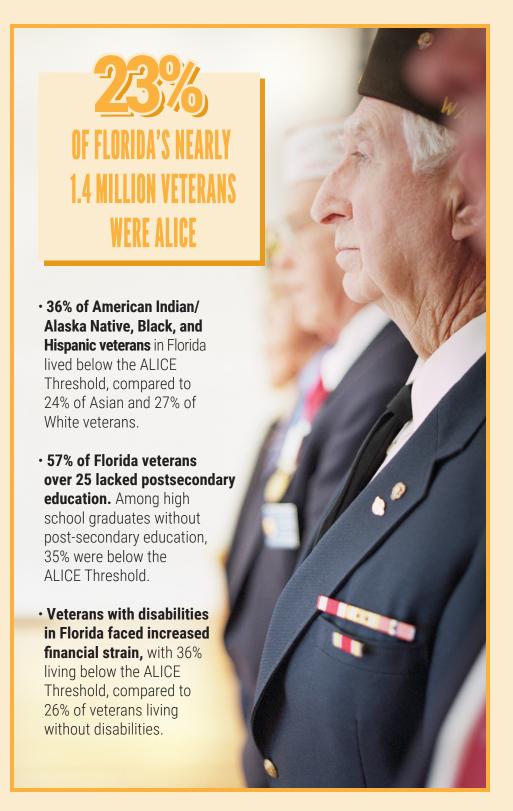
Did you know that 13% of Floridians live below the federal poverty level (FPL)?

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.





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.

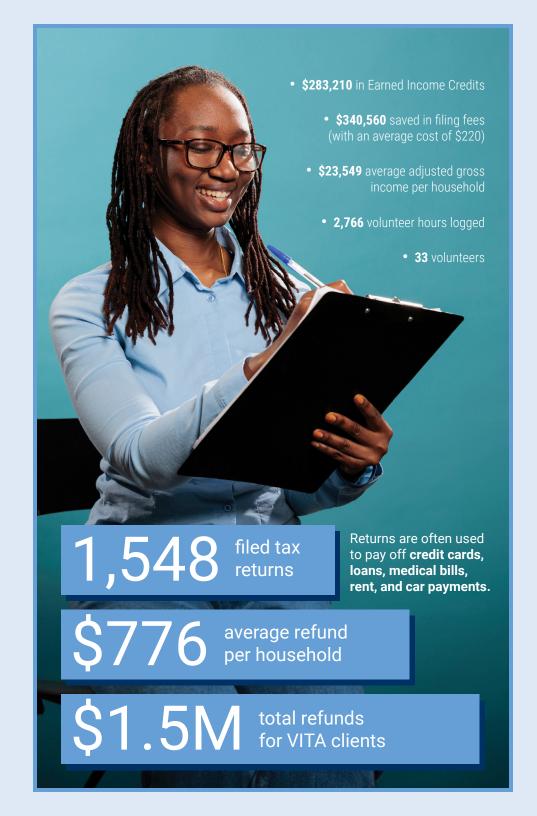


VOLUNTER INCOME TAX ASSISTANCE

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



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 (Asset Limited, Income Constrained, Employed).

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

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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

Merrill Lynch

Nelson Morgan Fessler Petersen

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

Northern Trust

Orchid Island Brewery

Oslo Packing Company

















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

ELITE SPONSORS (\$500)

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CVS Distribution Center
DLF Packing
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EverGreen Media
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Hometown News
Jones & Jones Advertising, Inc.
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McDonald's

Natalie's Orchid Island Juice

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

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

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

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Florida Power & Light Company George E. Warren Corporation Gifford Youth Achievement Center

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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

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Rehmann

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Samaritan Center Schlitt Services

School District of Indian River County

Seacoast Bank SouthState Bank

Space Coast Credit Union Spiezle 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 A. James & Alice B. Clark Foundation Chris and Keena Clifford

Bernard A. Egan Foundation, Inc

Betty MacMillan

Raymond J. and Sonia McGowan Edward and Dawn Michael

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Marlynn and Bill Scully
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King and Dace Stubbs through the
Indian River Community Foundation
Mrs. David K. Welles, Sr.

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

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

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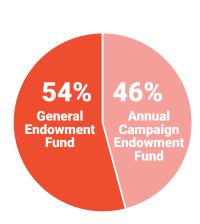
UNITED WAY FOUNDATION

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



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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 Investment Return, Net	\$147,000 \$584,614
TOTAL Public Support & Revenue	\$731,614
EXPENSES Community Support Services Endowment Operations	\$152,126 \$77,036
Total Expenses Changes in Net Assets Net Assets, Beginning of Year Net Assets, End of Year	\$229,162 \$502,452 \$4,833,415 \$5,335,867

TOCOUEVILLE 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 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.

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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.

43 donors who wish to remain anonymous

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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



United Way of Indian River County

Our Mission

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



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