



UNITED WAY  
Indian River County

# COMMUNITY IMPACT REPORT

24  
25



# A WORD FROM OUR LEADERSHIP

What does it mean to build a thriving community? It's not about responding to crises; it's about preventing them. It's not about isolated programs; it's about coordinated systems. It's not about charity; it's about strategic infrastructure that catches families before they fall.

That infrastructure is United Way, ensuring that when challenges arise, the response is swift, coordinated, and effective.

Our 2024-2025 year began with unprecedented tornadoes tearing through our community, and once again, our team stepped in to lead relief and recovery efforts. In the aftermath of Hurricane Milton, we saw an extraordinary outpouring of compassion. You showed up with your time, your resources, and your generosity—quickly, wholeheartedly, and with genuine kindness.

This year proved our model works. But what you witnessed wasn't exceptional; it was our everyday work made visible. The coordination. The partnerships. The rapid response. That's United Way—standing with individuals and families through life's challenges.

Two years ago, we launched Access to Justice, a groundbreaking public-private partnership with the Clerk of the Court and the first of its kind in Florida. In just two years, we've supported over 2,200 individuals facing civil and family law crises.

Why does this matter? Because an eviction isn't just a loss of a home—it disrupts education, employment, health, and long-term stability. When we prevent one eviction, we keep children in school, parents in their jobs, and families on pathways to financial security. This is prevention as infrastructure.

Our Volunteer Tax Assistance program isn't just about filing forms; it's about economic justice. This year, we secured over \$1.3 million in tax credits and returned \$1.94 million to nearly 2,500 local households. For families living paycheck to paycheck, those refunds aren't extra—they're essential. Rent gets paid. Groceries get bought. Cars get repaired. Crises are prevented.

We invested over \$1.5 million in 48 programs across 34 partner agencies, from early childhood education and mental health to food security and healthcare access. But we don't just write checks. We convene partners, eliminate duplication, fill service gaps, and ensure families experience coordinated support rather than fragmented services.

When you support United Way, you are not funding just another nonprofit. You are investing in the backbone infrastructure that enables dozens of programs to operate as one coordinated system of care.

This year also brought moments of celebration. We brought back the cherished Jackie Robinson baseball game and expanded community engagement events like our St. Paddle's Day Pickleball Tournament and our Block Party Featuring Trike Wars.

We cannot let visibility fade when headlines shift. Prevention, treatment, and social services must remain adequately funded or the next crisis will hit harder, more families will fall further, and recovery will take longer.

United Way is the force that brings the whole community together to solve problems too big for any one organization. We align partners, invest where data shows the greatest need, and build the systems that help families thrive.

This is the work United Way is built for. This is why your continued support is essential.

Together, we're building the resilience that helps our community thrive.

With gratitude and determination,



*Meredith Egan*

Meredith Egan  
Chief Executive Officer



*Katie Nall*

Dr. Katie Nall  
Board Chair

# BOARD OF DIRECTORS

Dr. Katie Nall, Chair  
Jamie Bell, Chair-Elect  
Curtis Carpenter, Secretary  
Jessica Churchill, Treasurer  
Brian McMahon, Ph.D., CIC Chair  
Christopher Bieber, At Large  
Dana M. Apfelbaum  
Bethany Burt  
Ryan Butler  
Amber Cerda  
Chris Ellis  
Kathy Hendrix  
Chris Hill  
Fred Jones  
Carole Jean Jordan  
Mike Mosel  
Capt. Ross Partee  
Anne W. Posey, LMHC, NCC  
Suzanne Seldes  
Denise D. Smith, Ed.D.  
Caryn Toole

# OUR STAFF

Nate Bruckner  
Cindy Carr  
Tricia Crocco  
Meredith Egan  
Sydney Mihailoff  
Amanda Morgan  
Miguel Saldana  
Jessica Schmitt, CFRE  
Deana Shatley  
Sarah Tucci  
Annette Yost



**With your support,  
we invested \$3.68  
million in community  
impact including \$1.59  
million towards 48  
programs at 34 agencies  
and \$2.09 million driving  
additional initiatives—  
helping 1 in 4 people in  
Indian River County.**

## IMPACT AT A GLANCE



### Health | \$615,960 Invested

45,715 People served through access to nutritious food, mental health services, dental care and senior services.



### Education | \$559,945 Invested

3,183 Children supported with high-quality early education, enriched after school programming and leadership development.



### Financial Stability | \$717,852 Invested

22,098 Neighbors served with emergency case management, affordable housing, job training, budgeting skills and free income tax preparation.



### Community Resilience | \$1,783,918 Invested

2,727 People supported post-disaster

# FUNDED PROGRAMS

## Alzheimer & Parkinson Association of Indian River County

Respite: Caring for the Caregiver

## American Red Cross, South Florida Region

Home Fire Prevention & Emergency Assistance

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

Community Based Mentoring · Passport to Early Literacy

## Boys & Girls Clubs of Indian River County

Project Learn

## Camp Haven, Inc.

Pathways to Financial Stability

## Catholic Charities of the Diocese of Palm Beach

Samaritan Center for Homeless Families

## Childcare Resources of Indian River

Subsidized High Quality Childcare · Wellness & Early Intervention Program

## Children's Home Society of Florida, Treasure Coast Region

Dodgertown Elementary Community Partnership School

## Crossover Mission

Accelerate My Potential (AMP) Program · Healthy Kids Program  
Transcendence Academy

## Drug Abuse Treatment Association, Inc.

Norman C. Hayslip Treatment Center, Fort Pierce · Outpatient Treatment Center

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

VPK Completers

## Gifford Youth Achievement Center, Inc.

After School Education Program (ASEP)

## Hibiscus Children's Center, Inc.

Career Pathways to Independence Program

## Indian River County Healthy Start Coalition, Inc.

Babies & Beyond · Healthy Families · Nurse Family Partnership · Parents as Teachers

## Indian River Habitat for Humanity

Critical Home Repair Program

## Literacy Services of Indian River County, Inc.

Adult & Family Literacy

## Mental Health Association in Indian River County

Walk-In & Counseling Center

# FUNDED PROGRAMS

## Mental Health Collaborative of Indian River County, Inc.

McCabe Connections Center

## Pelican Island Audubon Society

Audubon Advocates After-School Lagoon Science Program

## Redlands Christian Migrant Association, Inc.

Enhancing Early Learning & Family Support Services

## SafeSpace, Inc.

SafeSpace Domestic Violence Services

## Senior Resource Association, Inc.

DayAway Program · Senior Navigation Program  
Meals on Wheels/Emergency Meals on Wheels

## The Arc of Indian River County

Behavioral Analysis Program · Supported Employment Program

## The Hope for Families Center, Inc.

Helping Homeless Families Achieve Success

## The Learning Alliance, Inc.

Moonshot Families · The Learning Alliance Summer Programs

## The Salvation Army

Homelessness Prevention & Social Services Program

## Thrive

Prevention Works! · Recovery Works!

## Treasure Coast Community Health, Inc.

Dental Services

## Treasure Coast Food Bank, Inc.

Mobile Pantry

## Treasure Coast Homeless Services Council, Inc.

Homeless Resource Center

## United Against Poverty, Inc.

Success Training for Employment Program (STEP)

## Veterans Council of Indian River County, Inc.

Veterans Case Management & Direct Aid

## Visiting Nurse Association of the Treasure Coast

Telehealth: Chronic Disease Management Program

## Youth Guidance Mentoring Academy

Pre-Apprenticeship Program · The Mentoring Academy

# COMMUNITY IN ACTION

## Neighbors Guiding Change

At the heart of our mission is trust, trust that every dollar given by our donors is making a real difference. The Citizens' Review Process (CRP) ensures just that. Each year, nearly 100 local volunteers come together to carefully review funding requests, visit agencies, and evaluate the programs shaping lives across Indian River County.

The volunteer-driven process is how we uphold transparency and accountability. Every funding decision is made by people who live and work right here in our community, people who want to see local families thrive. Through their time and commitment, CRP volunteers help direct resources to where they're needed most, ensuring that support reaches programs that strengthen health, education, and financial stability.



**"This is more than just funding programs—it's about building a connected, reliable safety net. When someone faces a crisis, it's rarely one-dimensional. We work to ensure families have the support they need not just to survive, but to move forward.**

**Brian McMahon, Ph.D.**  
Director of Accountability & Research  
School District of Indian River County  
Community Impact Committee Chair  
United Way Board Member



**93**

total volunteer  
Citizens' Review Panelist

**938**

total volunteer  
panelist hours



**2,484**

clients served

**\$1.94M+**

in total refunds



**\$1,225**

average refund

## Free Tax Prep: Putting Money Back in Local Pockets

The Volunteer Income Tax Assistance (VITA) program once again made a powerful impact this year, returning nearly \$2 million to Indian River County residents through free, reliable tax preparation.

Supported by 37 trained volunteers, the program helped more than 2,400 individuals and families file their taxes accurately and claim valuable credits—like the Earned Income and Child Tax Credits—while saving hundreds in filing fees.

For working families, these refunds provided more than financial relief, they offered stability, opportunity, and peace of mind.



## LEADING TOGETHER

### Honoring Local Changemakers

This year's Community Leaders' Breakfast gathered nearly 200 community members at Celebration Grove for a morning of inspiration and connection. Sponsored by Seacoast Bank, the event featured keynote speaker and author Rena Romano, whose message of resilience and hope resonated deeply with attendees. United Way CEO Meredith Egan and Board Chair Dr. Katie Nall highlighted the power of unity and collaboration in addressing Indian River County's most pressing needs.

The morning also celebrated community service through the Richardson Spirit of Indian River County Awards. Honorees included Schlitt Services, Indian River County Healthy Start Coalition, United Against Poverty, and Jeff Pickering of the Indian River Community Foundation. The Ralph T. King Award was presented to Michael Kint, recognizing his decades of leadership and lasting contributions to mental health and early childhood development. These stories shared at the breakfast remind us when we united as a community, we create lasting change for Indian River County.



### Conversations that Inspire Action

Powered by Purpose continued to spark meaningful dialogue and collaboration this year. The speaker series brought together local leaders, experts, and residents to address issues shaping life in Indian River County, from the housing crisis and rising costs for working families to gaps in women's and children's healthcare and the need for second chances for justice-involved individuals.

Hosted by Northern Trust, each session encouraged open discussion, fresh perspectives, and shared solutions. The kickoff "Meet the Funders" event strengthened connections between nonprofits and funders, reinforcing United Way's role as convener, bringing people and resources together to drive lasting change across our community.



In Indian River County



**1 in 2**

renters are  
cost-burdened

**20.7%**

maternal morbidity

Recidivism drops by

**66%**

with education  
& work programs



**Team Publix** Troy Clemenzi, Ryan Paulsen and Doug Theall secured their second Trike Wars victory, having also won the event's inaugural year.



# UNITED WAY GAMES

## Community Events with Purpose

Throughout 2024-2025, we brought people together through events that celebrated service, strengthened community spirit, and fueled local impact.

Our 29th Annual Day of Caring mobilized more than 500 volunteers to complete 49 service projects across the county, assembling 287 early learning kits and creating a new Born Learning Trail in Sebastian.

Sporting events like the Second Annual Wiffle Palooza Tournament and Saint Paddle's Day Pickleball Tournament combined fun and philanthropy, raising funds to support programs that improve health, education, and financial stability.

In April, over 4,300 fans once again filled Holman Stadium for the Jackie Robinson Celebration Game, raising more than \$30,000 while honoring Robinson's enduring legacy of unity and progress.

The 39th Annual Citrus Golf Tournament carried on a decades-long tradition of generosity, and the Third Annual Trike Wars & Thank You Block Party capped off the campaign season with gratitude and good-spirited competition.

Each event reminded us that when our community comes together—on the field, in the park, or in service—lasting impact follows. We hope you join us this year!



# IMPACT IN ACTION

## Opening Doors to Justice

Our Access to Justice initiative ensures that community members who cannot afford an attorney still have a clear and supportive path through the legal system. In partnership with the Indian River County Clerk of the Circuit Courts, our Self-Help Center provides free, accessible guidance for individuals navigating family law matters, residential evictions, small claims, and other civil issues.

Now in its second year, the initiative has become a trusted resource for residents who might otherwise face the courts alone. With bilingual legal kiosks across the county, professional staff offering step-by-step assistance, and virtual pro bono attorney consultations for more complex matters, we help individuals understand their options, complete required forms, and move forward with confidence—strengthening housing stability, family well-being, and economic opportunity throughout our community.



**“Grateful you are available to the community to people who have no legal experience, but do not know if they need to get a lawyer for the situation they are in. It helps to start with a consultation.”**

**Client Testimonial**  
Access to Justice, 2025



**2,245**  
Total clients across  
four Self Help  
locations



**264**  
Consultations  
125 Family Cases  
139 Civil Cases



**14**  
Pro Bono  
Attorney  
Volunteers

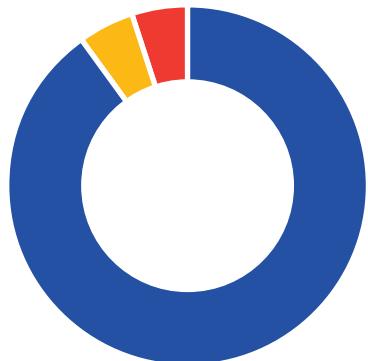


## WORKPLACE CAMPAIGN

**Workplace Campaigns give employees an easy way to support community-wide impact. This year, over 50 local businesses participated, contributing over 20% of our annual campaign.**

AT&T  
AYS Employee Leasing  
Best Buy Store # 816  
Boys & Girls Clubs of IRC  
Camp Haven, Inc.  
Childcare Resources of Indian River  
Children's Home Society of Florida  
City of Sebastian  
City of Vero Beach  
Cleveland Clinic Indian River Hospital  
Croom Construction Company  
Dillard's Department Stores, Inc.  
Drug Abuse Treatment Association  
Economic Opportunities Council of IRC  
Elliot Merrill Community Mgt.  
Enterprise Holdings Foundation  
Fellsmere Farms  
Florida Floor Fashions  
Florida Power & Light Company  
George E. Warren Corporation  
Gifford Youth Achievement Center  
Gould Cooksey Fennell  
Hibiscus Children's Center  
Indian River County  
IRC Clerk of the Circuit Court  
IRC Property Appraiser's Office  
IRC Sheriff's Office  
IRC Supervisor of Elections Office  
Indian River Habitat for Humanity  
Jacoby and Handley, PLLC  
Law Offices of Jennifer D. Peshke  
Literacy Services of IRC  
Manpower Group  
Mental Health Association in IRC  
Northern Trust  
Nylacarb Corporation  
Piper Aircraft, Inc.  
PNC Advisors  
Proctor Construction Co.  
Publix Super Markets  
Raymond James & Assoc.  
Redlands Christian Migrant Association  
Regency Windsor Companies  
Riverside Theatre  
Rossway Swan Tierney Barry & Oliver, P.L.  
Samaritan Center  
Schlitt Services  
School District of Indian River County  
Seacoast Bank  
Space Coast Credit Union  
Target  
TD Bank  
The Arc of Indian River County  
The Hill Group  
Thrive Indian River County  
Treasure Coast Community Health  
United Way of Indian River County  
Visiting Nurse Association of the TC  
Youth Guidance Mentoring Academy

# OUR FINANCIALS



With a commitment to transparency and thoughtful stewardship, United Way directs community contributions where they create the greatest impact. This past fiscal year, the Community Impact Fund supported 48 programs with a total of \$1.59M to advancing Health, Education, and Financial Stability for individuals and families across Indian River County.

**5%**  
Fund Development  
Expenses

**90%**  
Community Impact  
Expenses

**5%**  
Management &  
General Expenses

## Income

Public Support & Revenue	\$5,716,206
Net Campaign Revenue	\$2,652,531
Community Response Fund	\$150,627
In-kind Contributions	\$240,011
Investments, Net	\$35,897
Other	\$2,637,140

## Expenses

Community Support Services	\$4,846,663
Campaign Fund Development	\$273,609
Management & General	\$275,868
Total Expenses	\$5,396,140
Change in Net Assets	\$320,066
Net Assets, Beginning of Year	\$1,866,782
Net Assets, End of Year	\$2,186,848



# OUR SPONSORS

## TORCHBEARER SPONSORS

Cleveland Clinic Indian River Hospital  
Indian River County  
Merrill Lynch  
Northern Trust  
Publix Super Markets  
School District of Indian River County  
Seacoast Bank  
Space Coast Credit Union  
The Hill Group

## ELITE SPONSORS

AMAC  
Armfield Wagner, Inc. Appraisers  
Florida Power & Light Company  
Graves Brothers Company  
Kmetz, Elwell, Graham & Associates, CPA's  
Marine Bank  
Schlitt Services  
SouthState Bank

## EVENT SPONSORS

AYS Employee Leasing  
Bernard A. Egan Foundation  
Bread & Butter Pickleball Company  
Dean Mead Minton & Moore  
GHO Homes  
Gould Cooksey Fennell  
In Motion  
John's Island Real Estate  
Kmetz, Elwell, Graham & Associates, CPA's  
Marine Bank  
Morgan Petersen Wealth Management  
Northern Trust  
Offut Barton Schlitt, CPA  
PNC Bank  
Publix Super Markets  
Rehmann  
Route 60 Hyundai  
Schlitt Services  
Seacoast Bank  
Shambo Schwibner Schwartz  
Wealth Management Group  
Vero Beach Social Media

# DISASTER RECOVERY FUND

After Hurricane Milton swept through our slice of paradise leaving unprecedented damage, many ALICE (Access Limited, Income Constrained, Employed) families were pushed past the edge of stability. United Way mobilized quickly to meet immediate needs through our Disaster Relief Fund. Working alongside our partners, we convened the community to stand up the Multi-Agency Resource Center (MARC). In just one week, more than 1,750 neighbors came through its doors for food, supplies, financial assistance, and critical services. Beyond immediate relief, United Way continues to galvanize resources and coordinate long-term recovery—helping families rebuild stability and hope after the storm.

## \$250,000 - \$499,999

Indian River Community Foundation  
John's Island Community Service League  
Marlynn and Bill Scully

## \$100,000-\$249,999

Mr. and Mrs. Theodore W. Brickman, Jr.  
Corbett Foundation

## \$75,000-\$99,999

Indian River County Hospital District

## \$50,000-\$74,999

One Anonymous Donor  
Chris and Keena Clifford  
Laraine K. Harrison Charitable Fund  
Jay and Claire Robertson

## \$25,000-\$49,999

One Anonymous Donor  
Don and Mary Blair,  
The Blair Family Foundation  
Mr. and Mrs. D. Scott Deal  
Head, Heart and Hands of  
Indian River Club  
Impact 100 of Indian River  
Mr. and Mrs. Richard McDermott, Jr.  
through the Indian River  
Community Foundation  
Mr. Arthur Jackson, Jr.

## \$25,000-\$49,999 CONTINUED

Mr. and Mrs. Robert C. Puff, Jr.  
Don and Patsy Riefler  
Tommy and Simonetta Steyer  
Mr. and Mrs. Peter M. Thompson

## \$10,000-\$24,999

Jayne and Paul Becker  
Mr. and Mrs. Dale P. Bennett  
Duane and Dorothy  
Bluemke Foundation  
Burr Family Foundation  
Mr. and Mrs. Philip Coviello  
Mr. and Mrs. Alfred DeCrane, Jr.  
Hamner Family Charitable Fund  
Susan and Paul Hanson  
Kanawah Fund  
Jay and Linda Knoll  
Mr. and Mrs. John La Duc  
Wanda Lincoln  
Betsy and George McFarland  
Norris Family Fund  
Mr. and Mrs. Ronald F. Rosner  
Bob and Carmen Stork  
United Way of Florida, Inc.  
WPTV News Channel 5

**Donor lists reflects only 2024-2025 Hurricane Milton Disaster Recovery Fund gifts and is not inclusive of Campaign gifts.**



**1,752**

visitors served in one week at the MARC

**\$1.95M**

raised for relief and recovery efforts in Indian River County



**728**

families received assistance with rent, mortgage, and utilities

# TOCQUEVILLE SOCIETY

With an annual gift of \$10,000 or more, Tocqueville Society members are creating a profound and lasting impact throughout Indian River County. Donations received from July 1, 2024 - June 30, 2025.

Thank you to our Tocqueville Society Event Sponsors, Northern Trust and John's Island Real Estate.

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

Edward and Sherry Ann Dayton  
Jim and Jean Kelly  
Sharon and Bill Oglesby  
Jack and Mollie Rogers  
Ms. Patricia W. White

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

Duane and Dorothy Bluemke Foundation  
Chris and Keena Clifford  
Corbett Foundation  
Bernard A. Egan Foundation, Inc.  
Barbara D. Hauptfuhrer, in memory of Bob  
Raymond J. and Sonia McGowan  
Edward and Dawn Michael  
The Jake Owen Foundation  
Don and Patsy Riefler  
Marlynn and Bill Scully  
Mr. and Mrs. O. Griffith Sexton  
King and Dace Stubbs through the Indian River Community Foundation



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

Three Anonymous Donors  
Norman and Ann Baker  
Ms. Barbara Baldwin  
Virginia and Timothy Beaulac  
Susan and Dick Bergeman  
William and Marcia Blackburn  
Fritz and Gay Blaicher  
Don and Mary Blair,  
The Blair Family Foundation  
Mr. and Mrs. Theodore W. Brickman, Jr.  
Mr. Richard J. Cantly and  
Ms. Hope B. Woodhouse  
Wendy and Chase Carey  
Mary L. Casey  
Amy and Cecil Conlee  
Jane and Lorne Coyle  
Marybeth and Chuck Cunningham  
Gary and Donna Davis  
David and Harriet Dyer  
Dennis and Ellen Ferro  
Janet I. & H. James Field, Jr. Fund  
Four-Four Foundation, Inc.  
Bill and Laura Frick through the Indian River Community Foundation  
Susan and Paul Hanson  
Skip and Pat Hauser,  
Hauser-Nuckols Family Foundation  
Robert B. and Janet A.  
Hoffman Foundation  
J.M. Hopwood Charitable Trust  
Timothy and Cynthia Hultquist  
Mr. Henry K. Justi  
The Kahle Foundation  
Mrs. Fred Kasten  
Ted and Debbie Kelly

## LEADERSHIP CIRCLE

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

Mr. and Mrs. Jonathan M. Clark  
Mr. and Mrs. Christopher Kubasik  
Mr. Jonathan McNeilly

Ralph T. King  
Jay and Linda Knoll  
Mr. and Mrs. John La Duc  
Susie and Bill MacDonald  
Betty MacMillan  
Dennis and Karen Marlo  
Robert F. and Eleonora W. McCabe Fund  
Marilyn P. McConnell  
Betty and Jim McDonald  
Guy and Kacy Mitchell  
Charles and Susan Moritz  
Chad and Lisa Morrison  
Bob Morrison  
Sharon and David Northrup  
Jeffery Petersen and Maria Segura  
Barbe Bonjour Pike/Otis G. Pike Charitable Trust  
Ed and Jan Pillard  
Michael and Anne Rhoads  
Marjorie Hopwood Richardson and Danforth Kidd Richardson  
Sandy and Randy Rolf  
Lauren and John Roth  
Susan and Larry Salastro  
David and Betsy Sams  
Mrs. Charles V. Sheehan  
Anna Bain Slater  
Mr. and Mrs. David Smick  
Carl W. Stern and Holly Hayes  
Andrew & Jean Taylor  
Judith and Andrew Tucker  
Mr. Gilford B. Walker,  
Camp Younts Foundation  
Robert Washburn  
Michael and Susan White  
The Windswept Foundation  
Joan Woodhouse

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

1 Anonymous Donor  
Bill and Mary Ann Becker  
Mr. and Mrs. David R. Cerchie

## PLATINUM CIRCLE (CONTINUED)

Faith and Dick Coleman  
John H. and Susan Dobbs  
Ensio Family Foundation  
Mr. and Mrs. Frederick P. Floyd  
Andrew and Betsy Forrester  
Mr. and Mrs. Bernard M. Freeman  
Charlene A. Friedman  
Richard J. Greene  
Mary and Gordon Harnett  
Mr. and Mrs. Richard M. Haverland  
Mr. and Mrs. Christopher Hill  
Kip and Mary Jacoby  
Bob and Barbara Jones  
Barclay and Dennis Kass  
Ms. MaryMargaret Lucas  
Sue Moody

## GOLD CIRCLE (\$2,500 - \$4,999)

2 Anonymous Donors  
Susan P. Adams  
Linda Aiken, V.M.D.  
David and Tina Banta  
Jayne and Paul Becker  
John and Jean Beckert  
Mrs. Susan Bertolette  
Ms. Carole Beecher Brown  
Daniel Bryant  
Mr. and Mrs. Robert E. Byrket  
Mr. and Mrs. James Byrnes  
Mr. and Mrs. Peter Calfee  
Mrs. Barbara Cookson  
Mr. and Mrs. Philip Coviello  
Ms. Helan Cox  
Mr. and Mrs. John F. Curley  
Dick and Maryanne Davis  
Katharine and Rohit Desai  
Barbara and Dick Detwiler  
Helen and Keith Drewett  
David and Lynn Geiser  
Michael and Lisa Giessert  
Mrs. Mary P. Graves  
The Hitt Family Foundation  
Ginny & Lou Hoynes

Mr. John P. Moran  
Mr. and Mrs. James J. O'Connor III  
Dick Oehme  
Mr. Michael Perez and  
Ms. Barbara Edelstein  
Gary Phillips  
Ms. Bonnie Simpson  
John and Terry Souza  
Jane and John Todd  
Jeff and Carol Twyman  
Susan van der Stricht  
Mr. Douglas K. Watson and  
Ms. Susan Hunter  
Andy and Robin Williams  
Mr. and Mrs. B. Robert Wood

Dr. and Mrs. Leander Jennings  
Mr. and Mrs. James Johnson  
John C. and Mary P. Kurtz  
Mr. William W. Lane  
Mr. and Mrs. Robert P. Luciano  
The Luther Family Foundation,  
John and Nancy Luther  
Barry and Robin MacTaggart  
Mr. and Mrs. Alan J. Maguire  
Ms. Brooke Megrue  
Nancy and Dick Milsten  
Mrs. Reginald B. Newman II  
Mr. Raymond J. Oglethorpe Jr.  
Patricia Perkins  
Jeffrey Petersen and Maria Segura  
Patricia Petersen  
Mr. and Mrs. Robert D. Reisman  
Jack and Penny Rohrbach  
Mr. and Mrs. Frank C. Schroeder  
Warren and Virginia Schwerin  
Gordon and Linda Stewart  
Mrs. Charlotte S. Stifel  
Bill and Carolyn Stutt  
Mr. John Titkanich  
Mr. and Mrs. Sten Tonnessen

## GOLD CIRCLE (CONTINUED)

Jennifer M Watson  
Dr. and Mrs. Marsh Youngbluth

## SILVER CIRCLE (\$1,000 - \$2,499)

21 Anonymous Donors  
Jay and Judy Anglada  
Dana & Nicolas Apfelbaum  
Lois W. Appleby through  
the Indian River  
Community Foundation  
Steve and Lucia Bailey  
Mr. and Mrs. Stephen C. Bailey  
Mrs. Samuel Bailey, Jr.  
Chris Balter  
Bob and Barbara Bandrimer  
Sue and Kit Barrow  
Mr. and Mrs. Linn Bealke  
Mr. and Mrs. J. Scott Beckwith, IV  
Jamie and Christy Bell  
Mr. and Mrs. John D. Rusher III  
Lisa Black  
John and Carolyn Bowers  
Zachary J. Brewer  
Michael L. Briante  
Nancy Briggs  
Bryce A. Bronson  
Cynthia Reason Broten  
Gavin M. Brothers  
Brian and Maureen Burkey  
Mr. and Mrs. Michael Burns  
Mr. Paul Carroll  
Judi and Sam Carroll  
Susan L. Chenault  
Mr. Ernest Chevrette  
Bill and Maryann Christie  
Mrs. Rosalen E. Cline  
Mr. and Mrs. Stephen C. Coley  
Ms. Natacha Colfer  
Bruce Colton  
Dalton J. Comer  
Chuck Cook  
Mr. and Mrs. Russell J. Crossman  
Kitty & Joe D'Agostino

Mr. and Mrs. Francis G. Ziegler  
Stewart's Shops and  
The Dake Family, a fund of  
The Community Foundation for  
the Greater Capital Region  
Heather Dales  
Patricia Daniels-Lindley  
T Danis Charitable Trust  
Riyad Deeb  
Mr. and Mrs. Glenn J. DeSimone  
Mr. and Mrs. J. Hugh Devlin  
Chris DiBenedetto  
Ann and John Dillon  
Rene and Alice Donars  
Mr. Michael D. Donovan  
Jeanne M. Drenga  
John and Patricia Dudzik  
Francis Dugan  
Sally and Don Dussing  
Timothy A. Dyce  
Russell Eddinger  
Ron and Kathy Edwards  
Meredith Egan  
Thyra Elliott  
Chris and Becky Ellis  
Crystal and Jeff Ellison  
Brad and Rebecca Emmons  
Dalton N. Ensling  
Steve and Mary Evans  
Patrick Faucheux II  
Mr. and Mrs. Gary S. Fischer  
Mr. and Mrs. William Flatley  
James and Hollis Forbes  
Mr. and Mrs. William H. Friesell  
Patti and Ted Frith  
Jim and Marjorie Fulmer  
Stephanie A. Gallagher  
Mr. and Mrs. James W. Gardner  
Katherine Garner  
Mr. Charles E. Garris

## SILVER CIRCLE (CONTINUED)

Mr. John O. Garrison  
Daniel and Robin Glotzer  
Joshua R. Greene  
Robert and Melvena Grice  
Mr. Donald Grinar and  
Ms. Suzanne Whiddon  
Nora and Madison Grose  
Mr. and Mrs. Tyler Guettler  
Mr. and Mrs. Charles J. Gulino  
Mr. and Mrs. Herbert W. Gullquist  
Jeannie Gustafson  
Ms. Charlotte A. Hadley  
Mr. and Mrs. Roger Haines  
Mr. and Mrs. James H. Hance, Jr.  
Sarah J. Hardin  
Crystal S. Hart  
Fagie Hartman  
Mr. Hendrik J. Hartong, Jr.  
Mr. and Mrs. Steven Hassur  
Mr. and Mrs. William W. Heim  
Kathy Hendrix  
Susie and Dave Hentschel  
Randy Hindert  
Stuart and Mimi Hirstein  
Douglas M. Hoffman  
Mr. and Mrs. Edward K. How, Jr.  
Mr. and Mrs. William N. Hudson  
G. M. Hughes  
Rick and Laura Hurley  
Nat Jackson  
Mr. Alan Jackson  
Dr. Jacqueline E. Jacobs  
Dr. and Mrs. Robert S. Janicki  
Roger W. Jones  
Elizabeth V. N. Judd  
Ms. Courtney L. Julian  
Dr. and Mrs. Garrick Kantzler  
Linda and Bernard Kastory  
Bob and Kate Khanna  
Theresa and Jim Kilman  
Michael and Sandy Kint  
William and Valerie Kirk  
Joseph A. Kowalczyk

Joseph D. Kuehl  
Michelle A. Landreth  
Shawn Marie and Chris Larsen  
Joseph M. Laviolette  
Mr. and Mrs. Alain Lebec  
Ms. Martha G. Lemasters  
Randall N. Lewis  
Margo Lind  
Mrs. Donald Lindell  
Marco P. Lopez  
Richard Lowry  
Mrs. Barbara B. Lynch  
Nancy and Roger Lynch  
Mr. and Mrs. William P. Lyons  
Leigh MacDougall  
Melinda Marley  
Sheila and George Marshall  
James D. and Shirin K. Marver  
Ed and Jo Massey  
Mrs. William B. Matteson  
Mr. and Mrs. Frank D. McCabe  
Mike McGee  
Mrs. William Ludwig  
David and Tammy McLean  
Alan and Ruthie McNally  
Anthony B. McNeal  
Ms. Cassandra E. Medina  
Mr. and Mrs. Edwin Mellett  
Jeremy W. Messersmith  
Muffe and Taylor Metcalfe  
Karen K. Meyer  
Mr. and Mrs. Seth Milliken  
Dr. George Mitchell, D.O.  
Kyle and Debbie Morgan  
Joseph E. Mullaney, Esq.  
Rudolph and Andrea Muller  
Edward Murphy, M.D.  
Dr. Katie Nall  
Mr. and Mrs. David Neithercut  
Vernice E. Nichols  
Mr. Edwin Offutt  
Roberta Olsen  
Mr. and Mrs. Robert P. O'Meara

## SILVER CIRCLE (CONTINUED)

Ms. Christy Paoletta  
Edward A. Parker Jr.  
Deborah H. Peniston  
Jim and Mary Buff Penrose  
James D. Perry  
Mr. and Mrs. Jonathan C. Peshke  
Phillippe J. Pierre  
Alan and Deborah Polackwich  
Anne Posey  
Mr. and Mrs. Theodore W. Price  
Jesse L. Richard  
Mr. and Mrs. Norman Rickard  
Dillon Roberts  
Mr. and Mrs. Talmage G. Rogers, Jr.  
Mr. Stephen A. Rooks  
Brad and Becky Rossway  
Wally Royals  
Alan and Christine Ryall  
Mr. and Mrs. David Ryan  
Mr. and Mrs. Joseph Schell  
Bob Schlitt Jr.  
Jeff and Cassie Schlitt  
Jessica D. Schmitt  
Mr. and Mrs. Robert A. Schneider  
Carolyn and Bill Schrader  
Mr. S. Van Zandt Schreiber  
John and Kathi Schumann  
Mrs. Julia Scott  
Suzanne and Jerry Seldes  
Mr. and Mrs. Andrew M. Senchak  
Jerry and Mary Rita Sheehan  
Mr. and Mrs. David C. Sherwood  
Muddy Pond Trust Fund  
Benjamin W. Sidorski  
Sandy and Tom Slaughter  
Scott C. Smith  
Mr. and Mrs. Joseph E. Smith  
Mr. James P. Smith  
Mr. Daniel E. Somes  
Karla and John Spooner  
Michael and Doreen Sproule  
Mr. and Mrs. David L. Squier

Cecelia Stalnaker-Cauwenberghs,  
Cleveland Clinic  
Diane and Norval Stephens  
Mr. Jason Svitenco  
Leslie & Mike Swan  
Linda and Mel Teetz  
Tom Tierney and Lisa Kahle  
Mrs. James W. Titelman  
Mr. and Mrs. William Tobin  
Dr. and Mrs. Richard Tompkins  
Sue and Chris Tompkins  
Austin T. Touchberry  
Mr. and Mrs. Jim Ueltschi  
Robert J. Valentin  
Linda Walton  
Mr. and Mrs. Stephen H. Warhover  
Laura E. Waters  
Mr. Joseph Wauters Jr.  
Brooke A. Weisman  
Mr. Kenneth L. Wessel  
Richard and Marsha Wheeler  
Tiffany L. Wilder  
Mrs. R. David Wilhoit  
Robert Williams and Karen Katen  
Dave and Bonnie Wilson  
Mr. Freddie Woolfork  
Ms. Jane W. Wykoff  
Mr. Karl Zimmermann

**Robin Lloyd**  
United Way  
Supporter



# BOARD OF DIRECTORS

Margo Lind, Chairman  
Seacoast Bank  
Sharon Northrup, Vice Chairman  
Mike McGee, Secretary  
Morgan Stanley  
Peter Calfee, Treasurer  
Calfee Financial  
Jessica Schmitt, CFRE, Staff  
Dana Apfelbaum  
Dean Mead Minton & Moore  
Alex Batt  
Warren Capital Management  
Meredith Egan (non-voting)  
United Way of Indian River County  
Chris Hill  
The Hill Group  
Stuart Hirstein  
Saint Edward's School  
Dawn Michael  
Kyle Morgan  
Nelson Morgan Wealth Management Merrill Lynch  
Dillon Roberts  
Gould Cooksey Fennell  
Suzanne Seldes  
Vero Beach Museum of Art  
Leslie Swan  
Indian River County Supervisor of Elections



**Margo Lind**  
Chairman

# UNITED WAY FOUNDATION

## Securing Tomorrow's Future

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.

At the beginning of Fiscal Year 2024, the United Way Foundation had \$6.6 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 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.

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



## 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	\$18,000
Investment Return, Net	\$764,269

## Total

Public Support & Revenue	\$782,269
--------------------------	-----------

## Expenses

Community Support Services	\$177,320
Endowment Operations	\$134,505

Total Expenses	\$311,825
Change in Net Assets	\$470,444
Net Assets, Beginning of Year	\$6,444,160
Net Assets, End of Year	\$6,914,604

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 Tocqueville Society. Each year, the Foundation will make a gift the annual campaign in their names in perpetuity.

## TOCQUEVILLE LEGACY CIRCLE (\$10,000+)

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 (\$1,000-\$9,999)

Norman and Ann Baker  
Bill and Nancy Curtis  
Chris and Don Loftus  
Jim and Melinda Marley  
Chad and 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

**The following companies, private foundations, and individuals have 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.**

### **LEGACY SOCIETY**

43 donors who wish to remain anonymous  
Fran Adams  
Valerie and Douglas Anderson  
The James G. and Ellen C. Andrews Revocable Trust  
L.W. Appleby Revocable Trust  
Eve Ballance in honor of Norma Lister  
Edward C. Bamberg  
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 Carty and Hope Woodhouse  
John "Jack" Chamberlain  
Susan L. Chenault  
Mr. and Mrs. J. Warner Clark  
P. Ross Cotherman, CPA  
Jane and Lorne 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  
Mr. and Mrs. Jack L. Ernsberger  
Mr. and Mrs. Kenneth D. Felten  
Dennis and Ellen Ferro

Henry Patrick Fitzgerald  
Mr. and Mrs. William O. Fleming  
Florida Power and Light  
Gifford and Ellen Foley  
Mr. and Mrs. John B. Ford III  
Faith G. Frazier  
Jim and Jennifer Gabbard  
Priscilla and Dick Gavoor  
Mrs. John R. Gould  
Gracewood Fruit Company  
Norva Z. Green  
Lynn Hall  
Marilyn Hammond  
Jay W. Hart  
Henry Patrick Fitzgerald  
Mr. and Mrs. William O. Fleming  
Florida Power & Light  
Gifford and Ellen Foley  
Mr. and Mrs. John B. Ford, III  
Faith G. Frazier  
Jim and Jennifer Gabbard  
Priscilla and Dick Gavoor  
Mrs. John R. Gould  
Norva Z. Green  
Lynn Hall  
Marilyn Hammond  
Jay W. Hart  
Margaret Harvey  
Bill and Carolyn High  
Mr. and Mrs. Don R. Hinkley  
John and Mary Hobart  
John H. Holliday and Phyllis B. Holliday  
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  
Ilain Isaac  
Mr. and Mrs. Richard S. Jackson

### **LEGACY SOCIETY (CONTINUED)**

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  
Ron Mather  
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  
Charles O. McKenzie  
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 Mixter 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. Paull  
Raymond W. Paulsen  
Bill and Karen Penney  
Raymond T. Perring  
William and Mary Phelan  
Deborah Morrell Polackwich and Alan Polackwich  
Dan and Joan Preuss  
Mr. Clay Price  
Jerome D. Quinn  
Estate of Clarence W. Redstone  
Mr. and Mrs. Robert D. Reisman  
Richardson Foundation  
Mr. and Mrs. C. Graydon Rogers  
Hugh Rosaaen  
Mrs. Katherine H. Rose  
Brad and Becky Rossway  
David and Betsy Sams  
Mark and Carolyn Sanchez  
The Schumann Foundation  
Mr. and Mrs. John Schumann, Jr.  
Marlynn and Bill Scully  
Mr. and Mrs. John C. Scully  
Thomas and Charo Segura  
Mr. and Mrs. David Shapiro  
Fred and Jean Sirianni  
Peggy and John Sirich  
Matthew J. and Anne B. Smith  
Leroy Smith  
Louise L. Smith  
Mrs. Margaret A. Smith  
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  
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 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.

### **MEMORIAL GIFTS**

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 Jaques  
Charles R. Johnson  
Ruth Karpf  
Ray Kempkin  
Ralph King  
Thomas A. Lewis  
Jon W. Ludwig

J. Albert Marshall, Jr.  
Walter J. Matthews  
John McConnell, Sr.  
James Orr McCue, Jr.  
John C. Metzger, Jr.  
Danforth Miller, Jr.  
Jim Milliken  
Fils-Hime Naus  
Martin G. Noon  
Kay and Walter O'Malley  
Christy Pappadoupios  
C. Gorham Phillips  
Alphonsus Polackwich  
Jack W. Price, Jr.  
Mitchell Rendell  
Elizabeth M. Rich  
Charlotte Anne Rolfe  
William Romanowski  
Marguerite Schlitt  
Tom Segura  
Marguerite Lydia Shattuck  
Jean Sirianni  
Trevor Smith  
Jane Osborne Stoddard  
Virginia Wollenzin  
George Wonderly  
Joseph Zemke  
Ruth M. Zimmer

### **CREATE IMPACT THAT LASTS**

Learn more about endowed giving through the United Way of Indian River County Foundation.

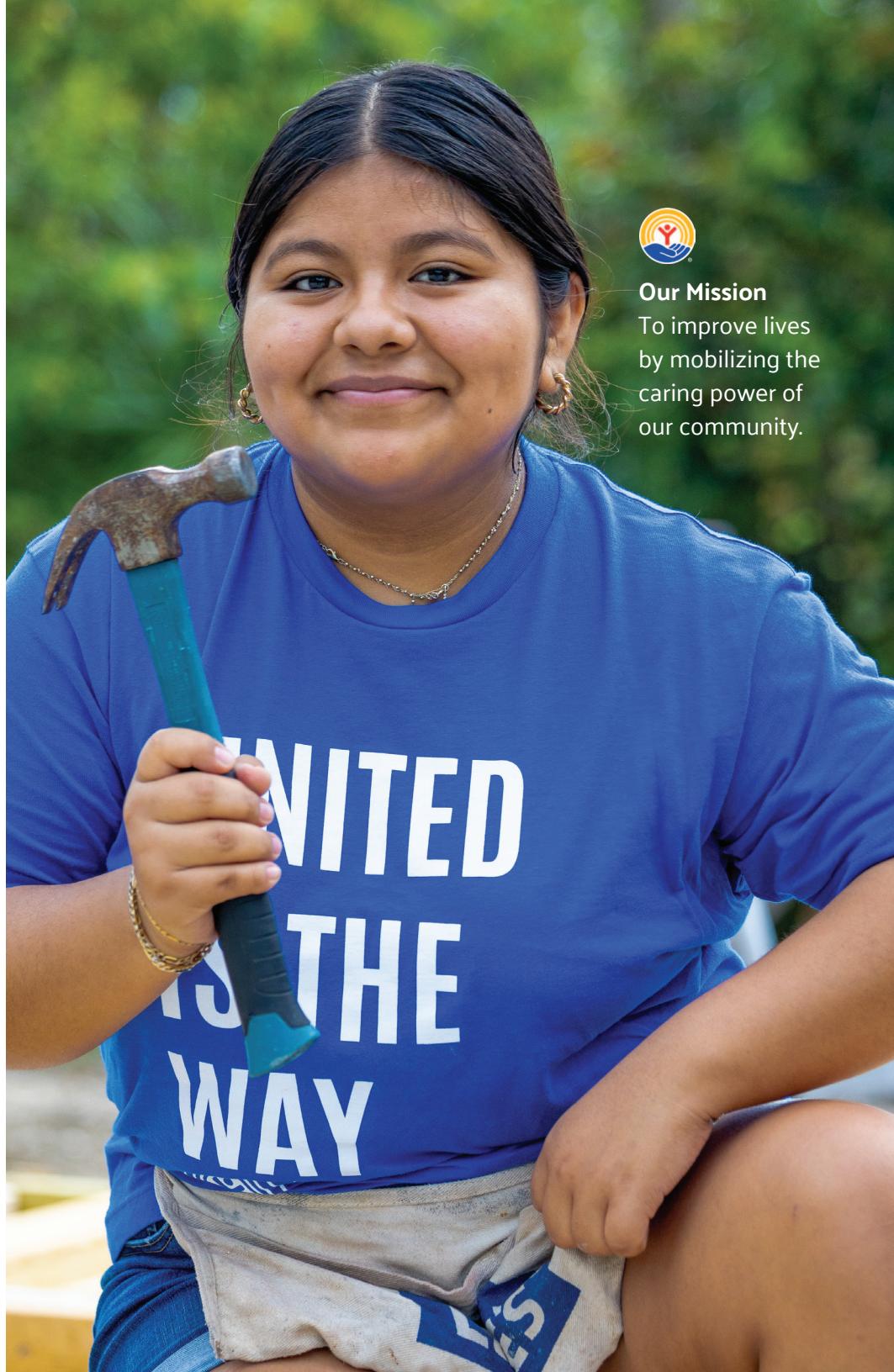
**Meredith Egan, CEO**

(772) 567-8900, ext. 125

[Meredith.Egan@UnitedWayIRC.org](mailto:Meredith.Egan@UnitedWayIRC.org)



→ **Donate and Learn More at**  
**[UnitedWayIRC.org](http://UnitedWayIRC.org)**



### **Our Mission**

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



# UNITED WAY

Indian River County

1836 14th Avenue, Vero Beach, FL 32960  
(772) 567-8900 | [UnitedWayIRC.org](http://UnitedWayIRC.org)  
[@UnitedWayIRC](https://www.twitter.com/UnitedWayIRC)

