

Annual Report 2014-2015



THANK YOU



United Way
of Indian River County



Dear Friends,

Something you may not know about local United Ways, such as United Way of Indian River County, is that we are autonomous. We are not told how to raise funds or how to spend funds. We are, however, held accountable by United Way Worldwide to be transparent and fiscally responsible so that you, as people who live and work in the community we serve, know what we do with your generous contributions, and why.

We've always worked with a variety of community partners. In 2014, we established the first of our United Way Vision Councils, this one with a focus on education. We recruited members for this body from the school district, Indian River State College, the Education Foundation, from educators themselves, health workers, business representatives and interested community members. This group has conducted earnest, data driven discussions to identify specific pathways for improving education in Indian River County. This work will be followed by similar efforts in the focus areas of Financial Stability and Health.

This year, United Way of Indian River County answered an identified need for one comprehensive source of local volunteer opportunities. With the help of a member of our Board, Alan Polackwich, we now have an easy-to-use website with over 60 partner nonprofits registered to match volunteers with opportunities. Check it out at VolunteerIndianRiverCounty.org.

United Way invested over \$3 million dollars advancing the common good in Indian River County in 2014-2015. Thanks to the support of caring people like you, we are engaging the community to set vision and priorities, and working together to reach community goals. We will measure effectiveness, report back, and adjust where needed.

Improving education, financial stability and health are the most cost effective ways of improving societal outcomes. It isn't just giving money, it is helping people stand on their own.



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Mission:

To improve lives by mobilizing the caring power of communities.

Vision:

United Way of Indian River County will proactively build a strong, healthy, and caring community. United Way will bring our community together to focus on the most important human needs by building partnerships, forging consensus and leveraging resources to make a measurable difference.

COMMUNITY IMPACT



Education

As part of our effort to support education initiatives in the community, United Way and Seacoast Bank hosted the annual Community Leaders Breakfast in October 2014 presenting David Lawrence Jr., Chairman of the Children’s Movement of Florida, as guest speaker. “While the path to becoming educated begins in the very earliest years, the effects are lifelong,” Lawrence explained. United Way of Indian River County supports partners offering educational programs that offer support to parents of young children; prepare students to learn; provide safe after school destinations; and teach adults reading and writing skills.

- Big Brothers Big Sisters - Children of Promise
- Big Brothers Big Sisters - Reading Mentoring
- Boy Scouts of America Gulf Stream Council
- Boys and Girls Clubs of Indian River County
- CASTLE - High Hopes
- Childcare Resources of Indian River County
- Children’s Home Society of Florida - CINS/FINS
- Dasie Hope Center
- Early Learning Coalition
- Girls Scouts
- Gifford Youth Achievement Center - After School Education
- Hibiscus Children’s Center - Pathways to Independence
- Kindergarten Readiness Collaborative
- Literacy Services of Indian River County
- Moonshot Moment
- Redlands Christian Migrant Association
- Youth Guidance
- Youth Guidance Scholarships Program



Financial Stability

United Way supports financial stability programs that provide emergency food, clothing, and financial support; self-sufficiency assistance for the homeless; and relief for victims of disasters.

Children's Home Society of Florida - Transitional Living
 Economic Opportunities Council - REACH
 Samaritan Center
 SunUp ARC - Employment
 The Hope for Families Center
 Treasure Coast Homeless Services Council
 Treasure Coast Food Bank

Health

United Way supports health programs that offer medical care to the uninsured, dental care for young children, unique health care support for those with Alzheimer's and related disorders, and assistance for those who have speech and hearing impairments.

CASTLE - Safe Families
 CASTLE - Valued Visits
 Drug Abuse Treatment Association - Outpatient
 Drug Abuse Treatment Association - Residential
 Deaf and Hard of Hearing of the Treasure Coast
 Healthy Start - Belly Beautiful
 Healthy Start - TLC Newborn
 Healthy Start - Healthy Families
 Indian River County Health Dept. - Dental
 Mental Health Collaborative
 Mental Health Association - Crisis Walk-In
 Substance Awareness Center - LifeSkills Training
 SafeSpace
 Senior Resource Association - Adult Day Care
 Senior Resource Association - Meals on Wheels
 SunUp ARC - Behavior
 SunUp ARC - General Program
 Treasure Coast Community Health



Community Support Network

United Way supports our most vulnerable neighbors when they need a hand up the most.

2-1-1
 American Red Cross
 Children's Home Society Heart Gallery
 Community Collaboratives & Initiatives
 Connected 4 Kids Directory
 Emergency/Crisis & Special Project Fund
 Impact Initiatives
 Indian River County Executive Roundtable
 Indian River County Funders Forum
 USO

THE SPIRIT OF INDIAN RIVER COUNTY AWARDS

The following awards were given out at the 2014 Community Leaders Breakfast, honoring companies, agencies, and individuals that demonstrated excellence in a variety of philanthropic areas.

The Richardson Awards

Richardson Award:

For Excellence in Community Contributions
Seacoast National Bank

Richardson Award:

For Excellence in Volunteerism
Indian River County Supervisor of Election

Richardson Award:

For Excellence in a Workplace Giving Campaign
Piper Aircraft

The Spirit of Indian River County Awards

Spirit of Indian River County Excellence Award:

In honor of a small company's comprehensive commitment to strengthening our community (50 or less employees)
Brown & Brown Insurance – Vero Division

Spirit of Indian River County Excellence Award:

In honor of a large company's comprehensive commitment to strengthening our community (51 or more employees)
Disney's Vero Beach Resort

Agency Excellence Award

Agency Excellence Award:

Presented to an agency who demonstrates excellence in achieving measurable results and who has made an impact on the community, through their reach and their vision
Youth Guidance

Ralph T. King Award

Ralph T. King Award:

Presented to recognize long-term commitment and outstanding achievement by a United Way volunteer
Scott Lambeth

UNITED WAY DAY OF CARING

Impacting the Community

The annual campaign kicked off with Day of Caring on September 19, 2014. Hundreds of volunteers spread out in the community lending a hand to help others.



ANNUAL CAMPAIGN

Mike Swan, Rosway Swan Tierney Barry Lacey & Oliver, P.L. and his wife Leslie Swan, Supervisor of Elections, Indian River County, served as campaign co-chairs. They took on the important task of fund-raising setting, and then meeting, the highest campaign goal in our 54 year history. Thanks to an impressive number of volunteers and donors, over \$2.8 million was raised to advance the common good.



Thanks to the following for supporting the 2014-2015 campaign.

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Indian River Press Journal/TCPalm

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Croom Construction Company
CVS/Caremark Pharmacy
Cypress Trust Company
Dasie Hope Center
Dillard's Department Stores, Inc.
Disney's Vero Beach Resort
Donadio and Associates
Drug Abuse Treatment Association
Elliott Merrill Community Mgt.
Enterprise Holdings Foundation
Federal Express Corporation
Fellsmere Farms
Florida Atlantic University
Florida Floor Fashions
Florida Power and Light Company
Florida State Employee
Charitable Campaign
George E. Warren Corporation
Gifford Youth Achievement Center
Gould Cooksey Fennell
Grall Law Group
Grand Harbor Management
Harbor Community Bank
HealthSouth

Hibiscus Children's Center
Indian River County
Indian River Medical Center
Indian River Press Journal & TC Palm
Indian River State College
IRC Clerk of Circuit Court
IRC Healthy Start Coalition
IRC Property Appraiser's Office
IRC School District
IRC Sheriff's Office
IRC Supervisor of Elections Office
IRC Tax Collector
JCPenney Company
John's Island Property Owner's Assoc.
John's Island Real Estate Company
Kmetz Nuttall Elwell Graham, PLLC
Law Offices of Jennifer Peshke
Law Offices of John E. Moore, III
M. A. Ford Manufacturing Co.
Macy's
Marine Bank & Trust Company
Mental Health Association
Morgan Jacoby Thurn Boyle & Assocs
National Bank of Commerce
Norris & Company Real Estate
Northern Trust
Nylacarb Corporation
Omni Financial
Orchid Insurance
Parker Hannifin Corporation
Piper Aircraft, Inc.
PNC Advisors
Primary Care of the Treasure Coast
Proctor Construction Co.
Publix Super Markets
Raymond James & Assocs.
Redlands Christian Migrant Assoc.
Regency Windsor Companies
Rehmann
Riverside Theatre
Rossway Swan Tierney Barry Lacey &
Oliver, P.L.
SafeSpace

Samaritan Center
Schlitt Insurance Services, Inc.
Seacoast Bank
Sebastian River Medical Center
Senior Resource Association
Space Coast Credit Union
Stewart Evans Stewart & Emmons
Substance Awareness Center of
IRC
SunTrust Bank
Target
TD Bank
The Arc of Indian River County
The Hill Group
The Hope for Families Center

TJ Maxx / Marshalls / Homegoods
Town of Indian River Shores
Treasure Coast Community Health
UBS Financial Services, Inc.
United Parcel Service
United Way of IRC
Vero Beach Country Club
Vero Insurance
Visiting Nurse Association
Walmart
Wells Fargo
Wilmington Trust, N.A.
Windsor (Torwest)
Youth Guidance



2014-15 UNITED WAY FOUNDATION

The United Way Foundation is solely focused on building a permanent endowment to support the work of the United Way of Indian River County for generations to come. It affords donors the opportunity to continue building their legacy and extend their support of our local United Way beyond their lifetime through gifts in their will or trust, other planned gifts, and major outright gifts. The Foundation, in tandem with the Annual Campaign, builds capacity in meeting both current and future health and human service needs in our community.

The ongoing endowment campaign has secured commitments totaling more than \$1.9 million. Annually, 5% of the 5 year average value, is distributed to support the community-wide work of United Way of Indian River County. A milestone was reached in 2014 when a gift of \$1 million, the largest legacy gift to date, was made to the United Way Foundation.

Board of Directors

Scott Alexander
Regional President
Northern Trust

Ed Bamberg, Secretary
Financial Advisor
Merrill Lynch

Fritz Blaicher, Vice Chairman

Kip Jacoby, CPA
Partner - Morgan, Jacoby,
Thurn, Boyle & Assoc.

William N. Kirk, Chairman
Attorney

Edward (Ted) Michael
Retired

Lee Moore

Kyle Morgan, Chairman
Wealth Management Advisor

Bill Penney
President & Chief Executive Officer
Marine Bank & Trust

Jim Thompson
President
Buckingham-Wheeler Agency, Inc.

Hope Woodhouse, Treasurer
Retired Chief Operating Officer
Bridgewater Associates

Ned Dayton

LEGACY SOCIETY

Tocqueville Legacy Circle

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

Fred M. and Gay C. Blaicher
Edward and Sherry Ann Dayton
Ralph T. King
Betty and Jim McDonald

Edward and Dawn Michael
Marjorie Hopwood Richardson and
Danforth Kidd Richardson

Leadership Legacy Circle

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

Norman and Ann Baker
Mr. and Mrs. Bill and Nancy Curtis
Chris and Don Loftus

Daniel and Karen Somes
Mr. and Mrs. Norval B. Stephens, Jr.
Peter and Terry Sullivan

Legacy Society

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

43 donors who wish to
remain anonymous
Fran Adams
Valerie and Douglas Anderson
Eve Ballance in honor of Norma Lister
Alan Bartol
Robert W. Bauchman
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
Richard Canty and Hope Woodhouse
John "Jack" Chamberlain
Susan L. Chenault
Mr. and Mrs. J. Warner Clark
P. Ross Cotherman, CPA
D. Lorne and Jane R. Coyle
Carol Crittenden
Mr. and Mrs. William C. Cummings
Marybeth and Chuck Cunningham

Legacy Society *continued*

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
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
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
Mrs. John R. Gould
Gracewood Fruit Company
Jay W. Hart
Margaret Harvey
Bill and Carolyn High
Mr. and Mrs. Don R. Hinkley
John and Mary Hobart
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
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
Marcia P. Lunka

John and Nancy Luther
Alma Lee Loy
Ursula Ma
Michelle and Josh Malyn
Mr. and Mrs. Thomas Manwaring
The Estate of Stanley T. Manzer
Joseph L. and Sarah S. Marcum
Ed and Jo Massey
Walter J. and Mae S. Matthews
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
Chad Morrison
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
Bill and Karen Penney
Raymond T. Perring
William and Mary Phelan
Alan and Deborah Polackwich
Dan and Joan Preuss
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
Mrs. Stewart A. Dunn
Mark and Carolyn Sanchez
The Schumann Foundation
Mr. and Mrs. John Schumann, Jr.
Mr. and Mrs. John C. Scully
Thomas and Charo Segura
Mr. and Mrs. David Shapiro

Fred and Jean Sirianni
Peggy and John Sirich
Leroy Smith
Louise L. Smith
Mrs. Margaret A. Smith
Mr. and Mrs. Benjamin F. Stahl, Jr.
Estate of Florabel L. Stevens
Rosanne and Jeffrey L. Susi
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
Christine and Mike Videtic
Ethel M. Wasmuth Trust
Karl E. Wenk, Jr.
Lewis Stanley and
Myrna Newell Whitaker
Elizabeth Whittall
Archie S. Wingfield, Jr. Charitable Trust
Henry and Joan Woodhouse

Memorial gifts

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

Louis Allocca
Elliot A. Baines
Jesse Loy Baldwin
Elmer T. Browne
Margot Coleman
Dorothy Coufos
Archie T. Croteau
Mr. Charles E. Davis, Jr.
Olga Draper
Ellen Ann Dunham
Charles V. Fenn
Thomas Fratar
Hayden Harlow
Doris Hardesty
Mabel B. Harris
Mr. and Mrs. William B. Howell
Benjamin Jaques
Charles R. Johnson
Ruth Karpf
Ray Kempkin
Jon W. Ludwig
J. Albert Marshall, Jr.

Walter J. Matthews
John McConnell, Sr.
James Orr McCue, Jr.
John C. Metzger, Jr.
Danforth Miller, Jr.
Fils-Hime Naus
Martin G. Noon
Kay and Walter O'Malley
Christy Pappadouplos
C. Gorham Phillips
Elizabeth M. Rich
Charlotte Anne Rolfe
William Romanowski
Marguerite Lydia Shattuck
Jean Sirianni
Trevor Smith
Jane Osborne Stoddard
Virginia Wollenzin
George Wonderly
Joseph Zemke
Ruth M. Zimmer

ACCOUNTABILITY

United Way of Indian River County is a volunteer led organization which depends completely on local contributions.

United Way of Indian River County raised \$2.8 million in the fiscal year ending June 30, 2015. Support of programs and initiatives, especially in the areas of Education, Financial Stability, and Health, along with disaster preparedness, crisis needs, and community building, made up 83% of expenses.

United Way of Indian River County and the United Way Foundation value our fiduciary responsibility to donors and the larger community. Please find the financial audit and IRS 990's on our website at UnitedWayIRC.org.

United Way of Indian River County Statement of Activities, Year Ended June 30, 2015

Income	
Public Support, Revenue and Reclassifications	\$2,835,113
Expenses	
Community Support Services	2,241,927
Campaign Fund Development	295,120
Management and General	<u>163,178</u>
Total Expenses	2,700,225
Changes in Net Assets	134,888
Net Assets, Beginning of Year	<u>4,243,512</u>
Net Assets, End of Year	<u>\$4,378,400</u>



The United Way of Indian River County Foundation is the planned giving arm of United Way providing an additional revenue stream for essential services and responding to emerging community needs.

It is governed by a local, volunteer Board of Directors comprised of financial professionals and community leaders who are focused on devising strategies to build and wisely invest the endowment.

United Way of Indian River County Foundation Statement of Activities Year Ended June 30, 2015

Income	
Contributions	\$598,484
Investment Return	<u>(51,610)</u>
Total Public Support and Revenue	<u>546,874</u>
Expenses	
Community Support Services	64,224
Endowment Operations	<u>99,393</u>
Total Expenses	<u>163,617</u>
Changes in Net Assets	383,257
Net Assets Beginning of Year	<u>3,080,645</u>
Net Assets, End of Year	<u>\$3,463,902</u>





Volunteer

United Way's online volunteer connection provides a link for individuals, families, teams, and corporate groups to engage in meaningful volunteer opportunities throughout Indian River County. From motivating children to discover and learn, to serving hot meals to low-income families, Indian River County residents are responding to critical needs.

Find ways to give your unused materials and household items to agencies in need of donations, advocate for causes that require your passionate voice, and volunteer your time in ways that make a real difference at VolunteerIndianRiverCounty.org.

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