2018-2019 COMMUNITY IMPACT REPORT

United Way of Indian River County
We are change makers

Our Mission: To improve lives by mobilizing the caring power of community.

It is my privilege to serve as the 2018-19 Chair of your United Way Board of Directors. I am truly honored to have the opportunity to work with such a great organization and wonderful group of people, all of whom are working to make our home an even better place to live. We are pleased to present to you this year’s Community Impact Report.

I am thankful for every donor and volunteer who has helped us get to where we are today. We entered our 58th year of serving Indian River with renewed excitement, a leadership team dedicated to helping others, fresh ideas, and a focus on bringing more supporters into the United Way family. We are working to earn the trust and support of as many individuals and businesses that we possibly can to meet a growing number of needs.

Last year we reported that we had the most successful Day of Caring to date. 2018 was no exception. Our volunteers were surprised with a performance from the Vero Beach High School Varsity Cheerleaders and Marching Band. It was a wildly successful Saturday morning pep rally that left all of our volunteers energized for the day ahead. The event was a smash!

The Volunteer Income Tax Assistance program (VITA) set another record during tax season. A total of 1,234 tax returns were filed free of charge to our community members which ensured that each filer received the maximum amount of tax credits and refunds they deserve. In total, $1.5 million was given back to our community through VITA.

Another highlight was this year’s sellout Jackie Robinson Celebration Game. We had great weather as the St. Lucie Mets took on the Fort Myers Miracle. This is such a true community-wide event that provides wonderful sentimental memories of baseball at Historic Dodgertown, all in the name of United Way.

We saw great success in our community engagement work. Most notably in the establishment of the Senior Collaborative which convenes community partners around the issues of our aging population. Your United Way has seen considerable success in these endeavors starting with the Mental Health Collaborative (2004) and the Kindergarten Readiness Collaborative (2015). Both of those collaborative’s have grown into self-sustaining nonprofits, and the Senior Collaborative will certainly achieve the same success in years to come.

Our continued journey to Community Impact flourished this year with a record number of new programs and agencies requesting a partnership with United Way. 17 organizations expressed interest in applying for United Way funding, 8 were vetted and as a result, we welcomed 6 new agencies and 6 new programs.

We could not accomplish our mission without the staff of UWIRC who have dedicated their careers to helping and improving lives here in Indian River County, our determined Campaign Co-Chairs, Board of Directors, corporate partners, funded and community partners, our tremendous volunteers, and most especially our donors. Our donors recognize that their financial support is more than just a donation. It is an investment in their community’s future producing significant returns, as United Way and its community partners work to maximize the impact of the programs, services, and initiatives that we support.

On behalf of all those we serve, thank you for your support of our work!

Jeff Smith
Board Chair

Michael Kint
Chief Executive Officer
IMPACT AT A GLANCE

The Community Impact Fund provides grants to 43 programs that align with our Community Goals in Education, Health, and Financial Stability. Through this fund, United Way confronts our community's biggest challenges to drive measurable results and lasting change.

Collaboratives & Initiatives
Donor Designations

Community Investment

2018-2019

$2,173,954

$824,270

$771,885

$371,500

Academic Success
Graduate for Success
Early Learning
Basic Needs
Job Skills
Budgeting
Healthy Moms
Healthy Kids
Healthy Lives

INITIATIVES & COLLABORATIVES

Executive Roundtable of IRC
FamilyWize Prescription Discount Cards
Kindergarten Readiness Collaborative
Mental Health Collaborative of IRC
Moonshot Community Action Network
SAFER Indian River County
Senior Collaborative of Indian River County
University of Florida Foundation Inc.
Volunteer Income Tax Assistance (VITA)/ MyFreeTaxes.com
Health

Goal:
Improve Indian River County residents’ physical and mental health and to improve the quality of life for mothers, infants, and children.

Through United Way initiatives and partnerships, Indian River County saw:

- **6,015** individuals access preventative care services
- **2,613** individuals receive a mental health screening or intervention service
- **883** seniors access nutritious meals

**PARTNERS IN HEALTH**
Deaf & Hard of Hearing Services of the Treasure Coast
Drug Abuse Treatment Association
Indian River County Healthy Start Coalition
Mental Health Association in Indian River County
Mental Health Collaborative of Indian River County
SafeSpace
Senior Resource Association
Substance Awareness Center
Treasure Coast Community Health
Tykes & Teens, Inc.
VNA of the Treasure Coast

Education

Goal:
Increase the number of children who enter Kindergarten ready to succeed, increase the number of third graders who are performing on grade level, and increase the number of high school students who graduate on time.

Through United Way initiatives and partnerships, Indian River County saw:

- **1,533** children receive high quality early learning opportunities that provide the foundation for success in school and life
- **5,984** students gain valuable life and career skills to help them succeed now and in the future
Financial Stability

Goal:
A third of lower income families in Indian River County become more financially stable.

Through United Way initiatives and partnerships, Indian River County saw:

- 10% of students attended after school programs
- 86% of young children enrolled in partner programs improved developmental and literacy skills to be kindergarten ready
- 884 clients diverted from homelessness
- 153 individuals gain skills in financial management and develop budgeting strategies
- $1,314,572 refunded to 1,234 VITA/MFT clients
- 85% of clients increase their wage and improve employability

PARTNERS IN EDUCATION
Big Brothers Big Sisters
Boys and Girls Club of Indian River County
Childcare Resources of Indian River County
Children’s Home Society of Treasure Coast
Crossover Mission
Dasie Bridgewater Hope Center
Economic Opportunities Council
Education Foundation of Indian River County
Gifford Youth Achievement Center
Hibiscus Children’s Center
Indian River County Healthy Start Coalition
Redlands Christian Migrant Association
The Learning Alliance
Youth Guidance Mentoring Academy

PARTNERS IN FINANCIAL STABILITY
American Red Cross
Camp Haven
Catholic Charities
Children’s Home Society of Treasure Coast
Hope for Families Center
Literacy Services of Indian River County
The ARC of Indian River County
Treasure Coast Homeless Services Council
Veterans Council of Indian River County
Donors continue to see the value of investing in United Way of Indian River County’s Community Impact approach to local problems, leading the way from quick fixes to real, lasting change. Individuals, businesses, corporations, and foundations supported UWIRC’s effort to bring in $2,998,936 in fiscal year 2018-19.

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

**Income**

- Public Support & Revenue: $2,998,936
- Net Campaign Revenue: $2,632,530
- In Kind Contributions: $153,868
- Investments, Net: $71,285
- Other: $141,253

**Expenses**

- Community Support Services: $2,624,587
- Campaign Fund Development: $417,938
- Management and General: $173,838

**Total Expenses**: $3,216,363

**Changes In Net Assets**: (217,427)

**Net Assets, Beginning of Year**: $2,250,070

**Net Assets, End of Year**: $2,032,643

**Community Impact**: 84.10%

**Resource Development**: 10.2%

**Administration**: 5.70%

**Board Members**

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  Clerk of the Circuit Court

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  Schlitt Services, Vice-President

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  Merrill Lynch

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  Seacoast Bank

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  Publix, Store Manager – Miracle Mile

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  Retired

- John F. Beckert
  Retired

- Christopher Bieber
  CenterState Bank

- LaKisha Erwin
  SequelCare of Florida

- Major Eric Flowers
  IRC Sheriff’s Office

- Anthony P. Guettler
  Gould Cooksey Fennell

- Miranda Hawker
  IRC Health Department

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  Retired

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  Jones & Jones Advertising, Inc.

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  Daland Corp.

- Tom Manwaring
  SafeSpace

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  Indian River State College

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  Retired

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  Superintendent, IRC School District

- Jonathan Schwiering
  President, Vero Insurance

- Ralph Taylor
  Sebastian River Medical Center

- Rev. Benny Rhyant
  New Mt. Sinai Baptist Church

- Colonel Martin Zickert
  USAF, Retired

- Randy Riley, Ex Officio
  UW of FL Board Member
WORKPLACE CAMPAIGNS

AT&T
AYS Employee Leasing
Bank of America
Best Buy Store # 816
Big Brothers Big Sisters
Boys & Girls Clubs of IRC
Brown & Brown Central Coast
Camp Haven, Inc.
CenterState Bank
Childcare Resources of Indian River
Children's Home Society
City of Fellsmere
City of Sebastian
City of Vero Beach
Cleveland Clinic Indian River
Colton, Williams & Reamy, CPA's
Comcast Cable
Croom Construction Company
Crossover Mission, Inc.
CVS Health
Cypress Trust Company
Dasie Hope Center
Dillard's Department Stores, Inc.
Disney's Vero Beach Resort
Donadio and Associates
Drug Abuse Treatment Association
Economic Opportunities Council of IRC
Education Foundation of Indian River County, Inc.
Elliott Merrill Community Mgt.
Enterprise Holdings Foundation
Environmental Learning Center
Federal Express Corporation
Fellsmere Farms
Florida Floor Fashions
Florida Power and Light Company
George E. Warren Corporation
Gifford Youth Achievement Center
Gould Cooksey Fennell
Grall Law Group
HealthSouth
Hibiscus Children's Center
Indian River County
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
JCPenney Company
John's Island Real Estate Company
Kmetz, Elwell, Graham & Associates, CPA's
Law Offices of Jennifer Peshke
Law Offices of John E. Moore, III
Literacy Services of IRC
Lowe's Companies, Inc.
Macy’s
Marine Bank
Mental Health Association
Mental Health Collaborative of IRC
Morgan, Jacoby, Thurn, Boyle & Associates
National Bank of Commerce
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 & Associates
Redlands Christian Migrant Assoc.
Regency Windsor Companies
Rehmann
Riverside Theatre
Rossway Swan Tierney Barry Lacey & Oliver, P.L.
SafeSpace
Samaritan Center
Schlitt Services, Inc.
Seacoast Bank
Senior Resource Association
Space Coast Credit Union
Substance Awareness Center of IRC
SunTrust Bank
Syngenta Crop Protection, Inc.
Target
TD Bank
The Arc of Indian River County
The Hill Group
TJ Maxx / Marshalls / Homegoods
Town of Indian River Shores
Treasure Coast Community Health
United Parcel Service
United Way of IRC
Vero Insurance
Veterans Council of Indian River County
Visiting Nurse Association of the Treasure Coast
Walmart
Wells Fargo
Windsor (Torwest)
Youth Guidance
ELITE CAMPAIGN SPONSORS

Area businesses that give $500 in addition to their campaign contribution to help offset campaign costs.

Alex MacWilliam Real Estate
Armfield-Wagner Appraisal & Research, Inc.
AYS Employee Leasing
Brewer International
Brite Future Electric
CenterState Bank
Dale Sorensen Real Estate
Disney’s Vero Beach Resort
Florida Power and Light Company
Gould Cooksey Fennell
Graves Brothers Company
Kmetz, Elwell, Graham & Associates
Marine Bank
Morgan, Jacoby, Thurn, Boyle & Associates
National Bank of Commerce
Northern Trust
Omni Financial
Rehmann
Rossway Swan Tierney Barry Lacey & Oliver, P.L.
Schlitt Services, Inc.
USI Insurance Services
Wilmington Trust, N.A.

TORCHBEARERS

Workplace campaigns that make an early commitment and pledge to raise at least $12,000 in employee and corporate contributions.

Bernard A. Egan Foundation, Inc.
Cleveland Clinic Indian River
Disney’s Vero Beach Resort
Florida Power and Light Company
George E. Warren Corporation
Indian River County
IRC School District
IRC Sheriff’s Office
Marine Bank
Northern Trust
Piper Aircraft, Inc.
Publix Super Markets
Wells Fargo
EVENT SPONSORS

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Chick-fil-A
Countryside Citrus
Deck’s Edge Natural Wood Furnishings
Diamond R. Fertilizer Co., Inc.
Florida Power & Light
Gould Cooksey Fennell
Grall Law Group
Health First Health Plans
Kona Ice
Law Offices of John E. Moore, III
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Melissa M. Medlock, CPA
Northern Trust
Publix Super Markets
Quail Valley Charities
Rotary Club of Vero Beach
Sea & Ski Skin Protection
Simply Soothing
United Juice Company
Vero Insurance
Wells Fargo

GOLF SPONSORS

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Bernard Egan Foundation
Chick-fil-A
Countryside Citrus
Diamond R. Fertilizer
Florida Floor Fashions
Florida Irrigation Maintenance
George E. Warren Corporation
Gould Cooksey Fennell
JBT Food Tech
Natalie’s Orchid Island Juice Company
Nutrien Ag Solutions
Southern Eagle Distributing
Syngenta Crop Protection, Inc.
The Law Offices Of John E. Moore, III
Wawa Inc.
Wedgworth
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Sean P. Seevers CPA
Andrew & Tracey Segal
Mike Sepesy
Sir Neil and Lady Shaw
Jerry and Mary Rita Sheehan
Mrs. Charles V. Sheehan
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Muddy Pond Trust Fund
Jordan & Meredith Sihombing
Jennifer and David Sims
Sandy and Tom Slaughter
Mr. and Mrs. Crosby R. Smith
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L. P. Sperry, Jr.
Mr. Eric Stang
Ms. Kathleen Steed
Mr. and Mrs. Abbott Stillman
Dr. Cary Stowe
Ms. Amanda Sullivan
Susan S. Sumner
Leslie & Mike Swan
Ms. Maha Tadrous
Dhuanne and Douglas Tansill
Phillip and Helen Tasker
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Tom Tierney & Lisa Kahle
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Mr. Bradley Turner
Mrs. Agnes C. Underwood
Ashley Lynn Upchurch
Damian M. Vanetten
Faith Victory
Ms. Elisabeth Vris
Mr. and Mrs. Stephen H. Warhover
Mr. Douglas K. Watson and
Ms. Susan Hunter
Robert J. Watson
Mr. James Weixler
Mr. Kenneth L. Wessel
Richard and Marsha Wheeler
Ms. Lisa White
Mr. and Mrs. LeRoy Wilbur
Robert Williams and Karen Katen
Dave and Bonnie Wilson
Andrew and Leigh Wirth
Ms. Leigh Wirth
Mr. Alwyn E. Wolfarth
Mr. Frederick S. Wonham
Mr. and Mrs. B. Robert Wood
Judy and Allen Zern
Mr. and Mrs. Francis G. Ziegler
Jerry and Ellen Zollenberg
3 Anonymous Donors
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 by generating funds in support of the community-wide work of United Way of Indian River County.

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

**Income**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Contribution</td>
<td>$666,436</td>
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<tr>
<td>Investment Return, Net</td>
<td>$288,775</td>
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<td><strong>Total</strong></td>
<td><strong>$905,211</strong></td>
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**Expenses**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Community Support Services</td>
<td>$72,472</td>
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<tr>
<td>Endowment Operations</td>
<td>$115,591</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$118,063</strong></td>
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<tr>
<td>Changes In Net Assets</td>
<td>$717,148</td>
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<tr>
<td>Net Assets, Beginning of Year</td>
<td>$3,867,543</td>
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<tr>
<td>Net Assets, End of Year</td>
<td>$4,584,601</td>
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**Assets**

- **Donor Restricted Fund**
  - Endowed funds restricted in purpose to solely support United Way partner agency programming as part of United Way’s annual community investment process.

- **Donor Unrestricted Fund**
  - Endowed funds not restricted by donor in purpose to be used at the board’s discretion.

**BOARD MEMBERS**

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Dennis Ferro, Vice Chair
David Sams, Treasurer
CEO, G2 Investment Group
Mike McGee, Secretary
Financial Advisor, Morgan Stanley
Jan S. Beck
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Jonathan Schwiering, CIC
President, Vero Insurance
Marlynn Scully
STAFF:
Elizabeth Ullian, Executive Director
Leaving a Legacy

The United Way Foundation of Indian River County was established to help secure the financial future of the United Way by building an endowment to support the good work of UWIRC for generations to come. The endowment is being built through a combination of current contributions and deferred planned gifts including commitments for a charitable gift to the United Way Foundation in one’s will, living trust, or estate plan.

At the end of the 2018-2019 fiscal year, the United Way Foundation of Indian River County had $4.3 million in assets under management with another $5.6 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 UWIRC. By providing a dependable revenue stream year after year, these gifts ensure that UWIRC is positioned to respond to pressing community needs now and in the future.

We gratefully acknowledge our Tocqueville Legacy Circle, Leadership Legacy Circle, and Legacy Society members that have made commitments to being partners in our critical work in perpetuity.

To learn more about endowing your annual support call Elizabeth Ullian, Executive Director, United Way Foundation, at (772) 569-6777.

Legacy Society list

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

Fred M. and Gay C. Blaicher
Dick and Sally Brickman
Chris and Keena Clifford
Edward and Sherry Ann Dayton
Ralph T. King
Jay and Linda Knoll
Betty and Jim McDonald
Edward and Dawn Michael
Lee and John Moore
Marjorie Hopwood Richardson and Danforth Kidd Richardson
Sandy and Randy Rolf
Marlynn and Bill Scully

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

Norman and Ann Baker
Bill and Nancy Curtis
Chris and Don Loftus
Jim and Melinda Marley
Chad & Lisa Morrison
Dr. Julie Vargo and Dr. David O’Brien
David and Betsy Sams
Daniel and Karen Somes
Mr. and Mrs. Norval B. Stephens, Jr.
Peter and Terry Sullivan
Legacy Society

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

43 donors who wish to remain anonymous
Fran Adams
Valerie and Douglas Anderson
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
Peter Roy Carney
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
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Henry H. Hoyt, Jr.
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Kip and Mary Jacoby
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George and Sandy Kahle
The Kahle Foundation
Michael and Sandy Kint
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John and Nancy Luther
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Ursula Ma
Michelle and Josh Malyn
Mr. and Mrs. Thomas Manwaring
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Dennis and Karen Marlo
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
Nextera Energy Foundation, Inc.
The M. J. O’Brien Family Foundation
Anonymous Gift in Loving Honor of Ralph and Jane King
O’Malley and Siedler Families
Beverly B. O’Neill
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
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Priscilla and Dick Gavoor
Mrs. John R. Gould
Gracewood Fruit Company
Norva Z. Green
Lynn Hall
Mr. Richard W. Paull
Bill and Karen Penney
Raymond T. Perrin
William and Mary Phelan
Deborah Morrell Polackwich and Alan Polackwich
Dan and Joan Preuss
Estate of Clarence W. Redstone
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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 Siriani
Peggy and John Sirich
Leroy Smith
Louise L. Smith
Mrs. Margaret A. Smith

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

Louis Allocca
Elliot A. Baines
Jesse Loy Baldwin
Kathleen Branca
Elmer T. Browne
Margot Coleman
Dorothy Coufos
Ruth Karpf
Ray Kempkin
Ralph King
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John C. Metzger, Jr.
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Olga Draper
Ellen Ann Dunham
J.B. Egan III
Charles V. Fenn
Thomas Fratar
Jim Milliken
Fils-Hime Naus
Martin G. Noon
Kay and Walter O’Malley
Christy Pappadouplos
C. Gorham Phillips
Alphonsus Polackwich
Mitchell Rendell
Elizabeth M. Rich
Charlotte Anne Rolfe
William Romanowski
Hayden Harlow
Doris Hardesty
Mabel B. Harris
Mr. Forrest Haselton
Mr. and Mrs. William B. Howell
Benjamin Jaques
Charles R. Johnson
Marguerite Schlitt
Marguerite Lydia Shattuck
Jean Sirianni
Trevor Smith
Jane Osborne Stoddard
Virginia Wollenzin
George Wonderly
Joseph Zemke
Ruth M. Zimmer

2018-2019 UNITED WAY OF INDIAN RIVER COUNTY

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Meredith Egan, Chief Operating Officer
Tracey Segal, Campaign Director
Melissa Ogonoski, Director of Finance
Chance Morrow, Marketing Director
Nate Bruckner, Director of Community Impact
Caitlin Puppo, Workplace Campaign Manager
Eve Ballance, Community Impact Coordinator
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Lindsay Burcham, Office Assistant
Wanda Robinson, Receptionist
THANK YOU FOR LIVING UNITED.

UNITED WE FIGHT. UNITED WE WIN.