

COMMUNITY REPORT

2015-2016

LIVE UNITED

GIVE. ADVOCATE. VOLUNTEER.
UnitedWayIRC.org

UNITED WAY OF INDIAN RIVER COUNTY



EXECUTIVE LETTER

Dear Friends,

Our fiscal year 2015-2016 took us further down the road to Community Impact as we established two Vision Councils to lead our work in the areas of Financial Stability and Health in Indian River County. The Councils, which join the Education Vision Council, established in 2014, are comprised of strategically recruited members who have expertise or an identified skill set beneficial to the target issue. Members are local experts, direct service providers, business and government representatives and United Way staff and volunteers.

These Vision Councils recommended and the United Way Board of Directors approved community impact goals, to pave the way for current and future investment in Indian River County. You can read more on the following pages and on our website about these goals, along with indicators and outcomes that promise to make a measurable difference in identified local human service needs.

Our annual Community Leaders Breakfast in October, 2015, focused on financial stability and our vulnerable ALICE, (Asset Limited, Income Constrained, Employed) population, with the help of Lars Gilberts, Statewide United Way ALICE Director. United Way of Indian River County has always served this population and is acutely aware of the near crisis living situations for so many. Most of the programs we fund serve ALICE, many specifically target these individuals and families.

United Way celebrated another successful community fundraising campaign led by a team we affectionately called the Sensational Seven. (See more on this fantastic fundraising team under Annual Campaign.) The effort made it possible for us to invest \$3,300,000 towards advancing the common good in 15-16. We also put out a request for proposals from organizations that have not previously been funded by United Way, opening up our process to any nonprofit serving Indian River County with programs that can identify and track the outcomes and indicators included in our community goals.

We took a step towards more concentrated efforts to serve donors wanting to leave a legacy by hiring an Executive Director for the United Way Foundation. Our Chief Development Officer, Michelle Malyn agreed to take on the Foundation position and we're very excited about the growth of this supporting arm of United Way of Indian River County.

Our Board of Directors, primarily through the efforts of our Governance Committee, enhanced its efforts to internally monitor our organization looking at best practices, systems, policies and procedures and the overall governance provided by the Board and its committees.

Here at United Way, and through our funded partners, we are working hard at connecting all sectors of Indian River County to create long-term social change that produces healthy, well-educated and financially-stable individuals and families.

Consider this an open invitation to all who are interested in serving others, to join us, or any community organization working to improve the quality of life for our neighbors in need. Go to the United Way sponsored community site at www.VolunteerIndianRiverCounty.org, and see the many needs waiting to be filled by someone like you.

Sincerely,



Michael Kint, CEO



Randy Riley, Board Chair

2015-2016 Board of Directors

Randy Riley, Chair
Florida Community Bank

Susan Adams, Chair-Elect
*City of Fellsmere
Marsh Landing*

Jennifer Peshke, Secretary
Law Offices of Jennifer D. Peshke, P.A.

Melissa Medlock, CPA, P.A., Treasurer

Chris Loftus, Past-Chair

James R. Ackerman

Scott Alexander
Northern Trust

E. Fred Augenstein
The Ad Agency

Jan Beck

Dr. David Becker

John F. Beckert

Erin Grall, Community Impact Committee, Chair
Grall Law Group

Miranda Hawker
Florida Department of Health in Indian River County

Carol Johnson

Katie Kirk
Daland Corporation

Ted Michael

Beth Mitchell
Sebastian River Area Chamber of Commerce

Alan S. Polackwich, Sr., At Large

Jonathan Schwiering
Vero Insurance

Jeff Smith, CPA, CGFO, CGMA
Indian River County Clerk of the Circuit Court and Comptroller

Karl Williams, At Large
Marine Bank and Trust

Kip Jacoby, ex-officio
Morgan, Jacoby, Thurn, Boyle & Associates, P.A.

15-16 United Way Staff

Michael Kint,
Chief Executive Officer

Meredith Egan,
Chief Operating Officer

Sandra Block,
Director of Finance and Human Resources

Melissa Ogonoski,
Director of Finance

Margaret Ostman,
Marketing Director

Tracey Segal,
Campaign Director

Nate Bruckner,
Director of Community Impact

Eve Ballance,
Coordinator of Impact Initiatives

Caitlin Puppo,
Workplace Campaign Manager

Robin Votaw,
Campaign Associate

MaccaEna Gannat,
Campaign Associate

Lindsay Burcham,
Office Assistant

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

2015-2016 was the first year we implemented our Community Impact business model. Applications were solicited for funding programs addressing community-wide educational goals as determined by a Vision Council made up of local experts and committed volunteers. Next year, the process will be followed in the impact areas of Financial Stability and Health.

Learn more about United Way's Community Impact goals at

www.UnitedWayIRC.org/communityimpact

To see a list of funded organizations and Community Impact partners go to

www.UnitedWayIRC.org/community-partners



EDUCATION

Education is a cornerstone for success in school, work and life. It also benefits the whole community: high school graduates have higher earning potential, contribute more to their local economies, are more engaged in their communities, and are more likely to raise kids who also graduate on time.

The goals approved for our work in Education mirror efforts already underway in Indian River County.

GOALS

85%

of children enter Kindergarten ready to succeed by 2019

90%

of third graders perform at grade level and increase their positive behaviors by 2019

90%

of High School students graduate on time by the year 2019



EDUCATION

BASELINES

68%

of children entered Kindergarten ready to succeed (Florida Kindergarten Readiness Screener 2013)

56%

of children performed at grade level or above for Reading; 49% of children performed at grade level or above for Math (FL Dept. of Education, FL 2.0 Comprehensive Assessment Test, 2013 & 2014)

79.1%

of High School students graduated on time (FL Dept. of Education 2013-2014 School Year)

RESULTS

32%*

of children entered Kindergarten Ready to succeed (2016 Fall iReady Diagnostic Assessment)

56%

of children performed at grade level or above for Reading, 53% on grade level or above for Math (FL Dept. of Education, Standards Assessments 2016)

87%

High School Graduation Rate (Florida Dept. of Education 2015-2016 School Year)

*Measurement tool has changed since the baseline was established.

FINANCIAL STABILITY

When people are able to find good jobs, provide for their families and save for the future, they and their children are more likely to enjoy healthy lives and succeed in school. Everyone benefits, because financially stable individuals and families lead to a more competitive workforce and a stronger community.

Under the impact area of Financial Stability, the goal is for 33% of low income families to be more financially stable by 2020. That stability includes access to nutritious food, safe sustainable housing, and the skills to achieve and maintain employment and avoid financial crisis. United Way will have first year results in 2017.

542 **\$617,927**

TAX RETURNS WERE FILED FOR FREE BY
VOLUNTEER INCOME TAX PREPARERS

CAME BACK TO COUNTY RESIDENTS
AS A RESULT OF VOLUNTEER INCOME TAX PREPARED RETURNS

HEALTH

United Way addresses pressing health and healthcare issues facing the most vulnerable in our community, the elderly, those struggling financially, and the young. Together with our partner agencies, we target childhood obesity, nutrition programs, services for the deaf and hard of hearing, health prescription coverage, substance abuse, family violence, and oral health.

Good health is fundamental to people's capacity to enjoy their lives, provide for their families, and realize their dreams according to the Health Vision Council. They predict a 10% improvement in physical and mental health in the areas of healthy weight, major depressive episodes, and the ability to live independently; as well as a 10% improvement in the quality of life for mothers, infants and children in the areas of children's oral health, child abuse, prenatal care, children's mental health and childhood obesity. United Way will have first year results in 2017.



\$444,193.81

saved by Indian River County residents with
FamilyWise Prescription Discount Cards

COMMUNITY LEADERS BREAKFAST

ALICE refers to the population in our communities that are Asset Limited, Income Constrained, Employed, according to Statewide ALICE Director Lars Gilberts, guest speaker at the United Way Community Leaders Breakfast held Wednesday, October 28, 2015. The ALICE population represents those among us who are working, but due to child care costs, transportation challenges, high cost of living and so much more, are living paycheck to paycheck.

United Way Board Chair, Randy Riley, along with Board Chair-Elect, Fellsmere Mayor Susan Adams, presented annual Spirit of Indian River County Awards honoring companies, agencies and volunteers who give their time, talent and resources to make the community a better place. These prestigious awards were presented to the following honorees:

The Richardson Award for Community Contributions:
Wilmington Trust

The Richardson Award for Community Volunteerism:
Brown & Brown Insurance

The Richardson Award for Company-wide Employee Giving Campaign: Marine Bank & Trust

Spirit of Indian River County: Employs 50 or less people in Indian River County: **TWO WINNERS:** Rossway Swan Tierney Barry Lacey & Oliver, P.L and the Indian River County Supervisor of Elections

Spirit of Indian River County: Employs 51 or more people in Indian River County:
Indian River County Clerk of Circuit Court

Special Recognition – Community Service Award: Elliott Merrill Community Management

Agency Excellence Award: Big Brothers Big Sisters

Ralph T. King Award: Michael Kmetz

DAY OF CARING

United Way's traditional Day of Caring, as part of a larger Community Impact business model, invited all nonprofits in Indian River County to submit projects for volunteers to complete. Nonprofit agencies participating in Day of Caring have had to be United Way funded partners in past years.

New to Day of Caring was the construction of the county's first Born Learning Trail as part of the Martin Luther King Jr. Walking Trail and Park in Gifford. Born Learning is a United Way strategy for supporting early childhood learning in diverse ways; through reading programs, school readiness projects and yes, in parks.

300
VOLUNTEERS WORKED

30
JOB SITES ON
9/19/2015





Back row left to right: Katie Kirk, Susan Chenault, Kerry Bartlett
 Front row left to right: Leah Muller, Janie Graves Hoover, Sue Tompkins, Lenora Ritchie

ANNUAL CAMPAIGN

50

**VISION COUNCIL AND
 ADVISORY COUNCIL MEMBERS**
 set specific United Way
 goals in the impact areas
 of Education, Financial
 Stability and Health

24 Board of Directors members donated

1423

HOURS IN MEETINGS

99

**PEOPLE SERVED ON CITIZEN
 REVIEW PANELS**
 and made local funding
 recommendations

462

**LEADERSHIP INVESTMENT
 SOCIETY DONORS**
 contributed to this campaign

\$1,838,367 was invested in

43

HUMAN SERVICE PROGRAMS
 through 29 Funded Partners

116

WORKPLACE CAMPAIGNS
 raised dollars for the campaign

ANNUAL CAMPAIGN

The difference United Way makes in people's lives is the reason for our work. The Annual Campaign grows the financial support needed to make this good work happen.

A team of 7 community-minded women stepped up to take the helm of the 2015-2016 Annual Campaign and raised an unprecedented **\$3,004,570** to further the work of United Way in Indian River County. The fundraising campaign melded into our impact work of advancing the common good as seen by the following statistics shared at our community thank you event.

1248

RESIDENTIAL DONORS MADE DONATIONS

68

**ALEXIS DE TOCQUEVILLE
 SOCIETY DONORS**
 made contributions of
\$10,000 or more

18K

PIECES OF DIRECT MAIL
 went out to solicit funding

Learn more about the community-wide work of United Way of Indian River County at

www.UnitedWayIRC.org

2015-2016 CAMPAIGN SPONSORS

THANKS TO THE FOLLOWING FOR SUPPORTING THE 2015-2016 CAMPAIGN

Corporate Sponsors

BASF
Bayer
Bernard A. Egan Foundation, Inc.
Brackett Family Foundation
Brown & Brown Insurance Vero Division
Chubb Insurance
Colton Williams Reamy & Nelson CPAs
Crop Production Services
DECCO, US Post Harvest Inc.
Diamond R. Fertilizer
DuPont Crop Protection
Einstein Bagels
Florida Irrigation Maintenance Inc.
Health First Health Plans
JBT
John's Island Real Estate Company
KeyPlex
Kite Properties

Kmetz Nuttall Elwell Graham, PLLC
Level 4 Telcom
Marine Bank & Trust
Massey Romans Wealth Management
Minuteman Press
Monsanto
Morgan Jacoby Thurn Boyle & Associates
Northern Trust
Publix
PURE
Rehmann
Rossway Swan Tierney Barry Lacey & Oliver, P.L.
Route 60 Hyundai
Seacoast Bank
Sebastian Medical Center
Syngenta
Vero Insurance
Waste Management

Torchbearers

Bernard A. Egan Foundation, Inc.
Brown & Brown Insurance Vero Division
Disney's Vero Beach Resort
Florida Power and Light Company
Indian River County
Indian River Medical Center
Indian River Press Journal & TC Palm
IRC School District
IRC Sheriff's Office

Marine Bank & Trust Company
Northern Trust
Piper Aircraft, Inc.
Publix Super Markets
Rossway Swan Tierney Barry Lacey & Oliver, P.L.
Seacoast Bank
Waste Management Co.
Wells Fargo

Elite Campaign Sponsors

Alex MacWilliam Real Estate
Armfield-Wagner Appraisal & Research, Inc.
CenterState Bank
CVS Health
Disney's Vero Beach Resort
Florida Power and Light Company
Gould Cooksey Fennell
Grall Law Group
Graves Brothers Company
Indian River Press Journal & TC Palm

Kmetz Nuttall Elwell Graham, PLLC
Marine Bank & Trust Company
Morgan Jacoby Thurn Boyle & Associates
Northern Trust
Pelican Garden, ALF
Rehmann
Schlitt Insurance Services, Inc.
USI Insurance Services
Vero Insurance
Wilmington Trust, N.A.

Workplace Partners

AT&T
Bank of America
Berkshire Hathaway HomeServices
Best Buy Store # 816
Big Brothers Big Sisters
Boys & Girls Clubs of IRC
Brown & Brown Insurance
CASTLE
CDC Publishing LLC
CenterState Bank
Chase
Childcare Resources of Indian River
Children's Home Society
City of Fellsmere
City of Sebastian
City of Vero Beach
Colton, Williams, Reamy & Nelson CPA's
Comcast Cable
Croom Construction Company
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
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
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
Literacy Services of IRC
M. A. Ford Manufacturing Co.
Macy's
Marine Bank & Trust Company
Mental Health Association
Morgan Jacoby Thurn Boyle & Assocs
Morgan Stanley Smith Barney
National Bank of Commerce
Northern Trust
Nylacarb Corporation
Oculina Bank
Omni Financial
Orchid Insurance
Parker Hannifin Corporation
Piper Aircraft, Inc.
PNC Advisors
Primary Care of the Treasure Coast
Proctor Construction Co.

CAMPAIGN SPONSORS

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 Insurance Services, Inc.
Seacoast Bank
Sebastian River Medical Center
Senior Resource Association
Space Coast Credit Union
Substance Awareness Center of IRC
SunTrust Bank
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
Velcro USA, Inc
Vero Beach Country Club
Vero Beach Museum of Art, Inc.
Vero Insurance
Visiting Nurse Association
Walmart
Wells Fargo
Wilmington Trust, N.A.
Windsor (Torwest)
Youth Guidance
Zachry Group

CAMPAIGN SPONSORS



Every dollar donated to the 2015-2016 Annual Campaign was combined with contributions from thousands of other donors to support the community wide work of United Way of Indian River County.

\$1,000 to \$9,999

The amount given by Leadership Investment Association members

10 Years

The number of years Loyal Contributors have contributed to United Way in ANY amount

\$10,000

The minimum contribution from Alexis de Tocqueville Society members to United Way annually

2015-2016 UNITED WAY FOUNDATION

The United Way Foundation of Indian River County has been working on an important project in recent years to secure the financial future of United Way; to build an endowment that will have an impact for generations to come in supporting the good work the United Way of Indian River County does in this community in tandem with our community and funded partners.

The endowment is being built through a combination of current contributions and deferred planned gifts; commitments to include a charitable gift to the United Way Foundation in one's will, living trust or estate plan. It affords donors the opportunity to continue building their legacy, extend their support of our local United Way beyond their lifetime and provide for future health and human service needs of Indian River County. 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 in education, financial stability and health.

We gratefully acknowledge our Legacy Society members that have made commitments to being a partner in our good work in perpetuity. At the end of the 2015-16 fiscal year, the United Way Foundation of Indian River County had \$3.4M in assets under management with another \$4M in documented legacy gifts that will be made in the future.

To view a complete list of our Legacy Society members, learn more about endowing your annual support or how you can forever be a part of the good work you support today, visit www.unitedwayirc.org/unitedwayfoundation or call (772) 569-6777.

STAFF

Michelle Malyn
Executive Director

BOARD ROSTER

Kyle Morgan, Chairman
Wealth Management Advisor
Merrill Lynch

Fritz Blaicher, Vice Chairman

Ed Bamberg, Secretary
Financial Advisor
Merrill Lynch

Hope Woodhouse, Treasurer
Retired Chief Operating Officer

Scott Alexander
Regional President
Northern Trust

Jan Beck
Vice President, Mergers & Acquisitions
Troy Corporation

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

William N. Kirk
Attorney
Gould Cooksey Fennell

Edward (Ted) Michael
Retired

Lee Moore

Bill Penney
President & Chief Executive Officer
Marine Bank & Trust

Ned Dayton

52
LEGACY GIFTS

\$1.9M
GIFTS AND DEFERRED PLANNED GIFTS

We cannot possibly thank all the donors and volunteers that made this year's work successful, but learn more about giving levels and the generosity of current donors at

www.UnitedWayIRC.org/get-involved

FINANCIAL ACCOUNTABILITY

United Way of Indian River County would not be a successful agent for change without the trust and confidence of its donors and volunteers. To continue to earn that trust, we have established comprehensive accountability guidelines that are regularly reviewed by our Board of Directors and Finance Committee. As part of our efforts to be both accountable and transparent in our operations, our annual audit and IRS Form 990 are available on our website at unitedwayirc.org/financial-information-o.

This United Way raised \$2.98 million in the fiscal year ending June 30, 2016. Support of programs and initiatives, especially in the areas of Education Financial Stability, and Health, along with disaster response, crisis needs, and community building, made up 81.6% of expenses.

Charity Navigator, America's largest independent charity evaluator, once again awarded United Way of Indian River County the highest rating for sound fiscal management and commitment to accountability and transparency. This 4-star rating is reserved for "exceptional" charities and describes United Way of Indian River County as exceeding industry standards and outperforming most charities in its Cause.



United Way of Indian River County
Statement of Activities, Year Ended June 30, 2016

Income	
Public Support and Revenue	\$2,977,357
Expenses	
Community Support Services	2,373,108
Campaign Fund Development	381,145
Management and General	153,772
	<hr/>
Total Expenses	2,908,025
Changes in Net Assets	69,332
Net Assets, Beginning of Year	4,378,400
	<hr/>
Net Assets, End of Year	\$4,447,732

FINANCIAL ACCOUNTABILITY

United Way of Indian River County Foundation 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, 2016

Income	
Contributions	\$104,680
Investment Return (Loss)	-8,227
	<hr/>
Total	
Public Support and Revenue	96,453
Expenses	
Community Support Services	77,074
Endowment Operations	100,074
	<hr/>
Total Expenses	177,148
Change in Net Assets	-80,695
Net Assets, Beginning of Year	3,463,902
	<hr/>
Net Assets, End of Year	\$3,383,207

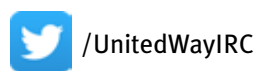
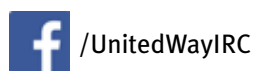
United Way values its fiduciary responsibility to donors and the larger community. Please find the financial audit and IRS Form 990's on our website at unitedwayirc.org/financial-information-o

United Way of Indian River County
1836 14th Ave., Vero Beach, FL
32960



GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED

**United
Way**



www.UnitedWayIRC.org | VolunteerIndianRiverCounty.org