



UNITED WE WIN.

LIVE UNITED®



United Way of Martin County

2016–2017 COMMUNITY IMPACT REPORT

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United Way of Martin County Board of Directors

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Ruth Pietruszewski, *Martin County Tax Collector's Office*

Chuck Shaffer, *Seacoast Bank*

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CHARACTER COUNTS! Chair: Blake Norman, *Marsh & McClennan*

United Way Foundation: Jean Laws-Scott, *Law Office of Jean Laws-Scott*

Martin County Interagency Coalition: Renay Rouse, *Martin County Health Department*

Volunteerism Chair: Frank Tidikis, *Vietnam Veterans of America Council 1041*

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Carol G. Houwaart-Diez, *President and CEO*

Lucy Corley, *Director of Community Engagement*

Ellen East, *Finance Assistant*

Elisabeth Glynn, *Director of Community Relations, Major Gifts and Endowments*

Carol Hodnett, *Vice President Community Impact and Volunteering*

Holly Laiben, *Director of CHARACTER COUNTS!*

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Kathleen Stacey, *RSVP Director*

Rachel Terlizzi, *Community Outreach Coordinator*

A Message From United Way's CEO and Board Chair



United Way of Martin County
President/CEO
Carol G. Houwaart-Diez



United Way of Martin County
Board Chair
Chad Hastings

On behalf of United Way of Martin County's Board of Directors, staff and those who have received life-changing services because of your support, we thank you for making our community's success a priority.

Our new brand credo states that we fight for the health, education and financial stability of every person in our community. We are only able to do this because of your generosity. The dollars you invest mean that burdens are lifted and people are breathing easier because of the programs supported by United Way.

This year we set out to find new solutions to old problems. We know we cannot do this alone; that it will take us all working together to help our community win. To achieve this, we hosted a series of community conversations to research our area's most daunting social crises so that we can leverage every dollar to address them.

We've also engaged thousands of volunteers who have donated their sweat equity to the tune of nearly \$2 million worth of vital services. These game changers understand that we are always stronger together than we are alone.

Thanks to the dedication of volunteers and donors like you, our United Way raised over \$2.7 million to invest locally to expand access to early childhood education, improve community health and maximize the value of employment for working families.

So, thank you for raising your hand to help us lead the fight and reach out to people who need help. And hope.

We have one life. To live better, we must **LIVE UNITED**.

Warm regards,

Carol G. Houwaart-Diez
President/CEO
United Way of Martin County

Chad Hastings
2017-18 Board Chair
United Way of Martin County

VISION STATEMENT

Bravely, we dream of a day when no one in Martin County goes to bed hungry. We dream of strong, successful families. We dream of a UNITED community where everyone is healthy and has the opportunity to succeed, reaching their fullest potential in a safe and secure place.

MISSION STATEMENT

To lift the community and change lives together through the collective power of advancing the common good.

BRAND PROMISE

- We win by living United.
- By forging unlikely partnerships.
- By finding new solutions to old problems.
- By mobilizing the best resources.
- And by inspiring individuals to join us in tackling the most daunting social crises in our community.

BRAND POSITIONING

United Way is committed to strengthening the health, education and financial stability of every person in Martin County.

BRAND IDEA

We ALL live better when we **LIVE UNITED**.

NEED MORE
INFORMATION ABOUT
UNITED WAY
OF MARTIN COUNTY?

UnitedWayMartin.org
772-283-4800



@UnitedWayMartin

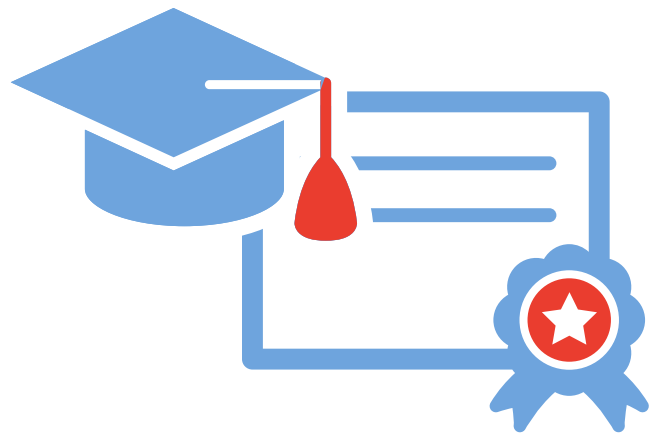
IMPROVE EDUCATION

**TOGETHER, WE ENSURE
ALL CHILDREN ARE
READY TO SUCCEED.**

OUR GOALS

**Increase the number of
children who:**

- Start school ready to succeed
- Read on grade level by third grade
- Enhance behavior and grades with the help of positive role models, tutors and after-school programs
- Graduate from high school on time



For Juleska, finding a quality preschool program for her daughters Yaneishka and Yaneily was a top priority. She was determined to find a program that was affordable, yet would provide an environment where her children would flourish academically and socially. That's when she found the Gertrude Walden Child Care Center in East Stuart. The school is a nonprofit established in 1976 with the mission of empowering all young children to become effective, enthusiastic and socially competent learners.

The majority of students enrolled at the school come from families living at or below the federal poverty level. Program funding from United Way helps families offset the cost of tuition, which is a huge relief for families like Juleska's where both parents work full-time, often juggling multiple jobs to make ends meet. By investing in preschool education today for local children like Yaneishka and Yaneily, we're ensuring more graduations for years to come.



OUR PARTNERS

ARC / HPS (Youth After School Program)

Big Brothers Big Sisters (BISS / Mentoring)

Boys & Girls Clubs of Martin County
(Project Learn)

Building Bridges to Youth (After School Program)

CASTLE (Safe Families)
(Strengthening Families)

Gertrude Walden Child Care (VPK)
(VPK Summer Slide)

House of Hope (Golden Gate Center for Enrichment)

Helping People Succeed (Baby Steps)

Hibiscus Children's Center
(Shelter Literacy Program)

Hobe Sound Early Learning Center (VPK)

Hope Center for Autism (Summer of Hope)

Hope Rural School (Parent Program)

Martin County School District
(Summer Reading Camp)

United Way of Martin County (CHARACTER COUNTS!)
(Martin Volunteers) (VITA)

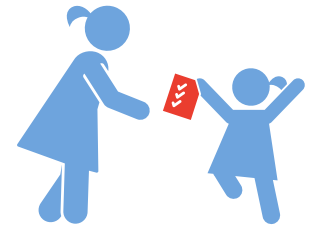
OUR RESULTS

Nearly
100%
of children



enrolled in a United Way funded VPK program were equipped with readiness skills to succeed compared to only 43% of kindergarten students in the entire county

Nearly
80%
of children



enrolled in United Way funded afterschool programs increased or maintained reading and math scores

286
students
at risk



of falling behind received additional instruction over the summer months by certified teachers resulting in 60 percent demonstrating reading gains



Your investment helps set
thousands of local students
on the path to success.

SUPPORT FINANCIAL STABILITY

**UNITED, WE SUPPORT OUR
MOST VULNERABLE RESIDENTS**



OUR GOALS

- Remove barriers to employment, such as transportation, lack of childcare or lack of the life skills needed to be independent
- Provide income support to help people manage personal finances, including assistance with income tax, emergency shelter, food and prescriptions



One of the greatest benefits Trisha has received from participating in the Community Connections program at Helping People Succeed is a sense of belonging. The program serves adults with disabilities by immersing them in the community through work, volunteering and community activities. Over the last five years the program has allowed Trisha to channel her greatest strengths – her cheerful disposition and social nature – to give back to the community as a volunteer at some of our area’s nonprofit organizations. Thanks to your investment in United Way, Trisha has grown by leaps and bounds and our community benefits from the value Trisha brings as a volunteer. View Trisha’s story at www.unitedwaymartin.org/Impact.



OUR PARTNERS

American Red Cross, Martin County Chapter
(Disaster Program)

ARC / HPS (ABLE Program) (Project Search)

Coalition for Independent Living (Transportation)

Council on Aging (Meals on Wheels)

Helping People Succeed (Community Connections)
(Project Search)

House of Hope (Pantry) (Project Hope)

Legal Aid Society (Legal Assistance)

Life Builders (Building Lives, Protecting Community)

Mary's Shelter (Pregnancy Shelter)

Project L.I.F.T. (Substance Abuse Program)
(Transportation / Employment Supports)

SafeSpace (Domestic Violence Program)

Salvation Army (Basic Needs) (Compassion House)

Treasure Coast Food Bank (Backpack & School Pantry)
(Whole Child Connection)

YMCA (Summer Feeding Program)

United Way of Martin County (Martin Volunteers)
(VITA)

211 of the Treasure Coast (Crisis & Community Hotline)

OUR RESULTS

Last year, United Way of Martin County's Volunteer Income Tax Assistance (VITA) program helped

372
individuals
and families

receive a total of \$435,282 in tax refunds



Residents saved **\$111,638** on prescription costs in 2016, as a result of the successful partnership with FamilyWize Community Service Partnership

Adults with disabilities participating in the ABLE program increased their employability skills by

20%



There was an increase of

10%

over last year in the number of people at risk of homelessness or going hungry who were provided with food or financial assistance



Your investment supports seniors, like Roger, in the Adult Day Health Program at the Council on Aging.

PROMOTE GOOD HEALTH

TOGETHER, WE ARE
CREATING SAFE AND
HEALTHY COMMUNITIES

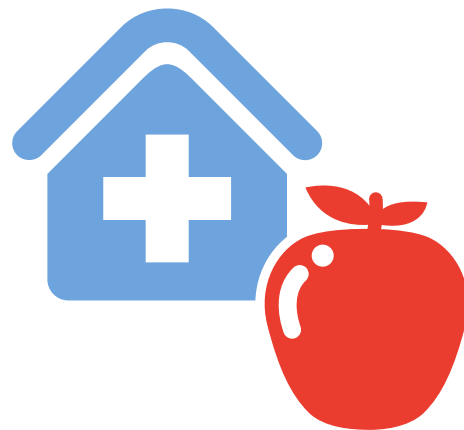


Today, Marcus is a thriving high school student who is on track academically and has aspirations for the future. But Marcus wasn't always this focused. Like many teens, Marcus found himself going down a troubled path. That's when he entered the program at Project L.I.F.T. (Life Initiatives For Teens). Project L.I.F.T. introduces youth who are struggling with substance abuse and mental health issues to skilled trades, engages them in innovative treatment programs and connects them with mentors who encourage and inspire. Through the program, Marcus has learned automotive maintenance and repair, boat repair and carpentry. His goal is to learn as many trades as he can through the program so that he can become an independent, competent and productive citizen of our community. Thanks to your investment in United Way, hundreds of at-risk youth like Marcus have been set on the right path and given the skills they need to succeed in life. View Marcus's full story at www.unitedwaymartin.org/Impact.

OUR GOALS

Increase the number of youth and adults who:

- Have access to necessary healthcare services – including preventative, maternal, mental, dental, pharmaceutical and vision
- Lead active and healthy lifestyles to prevent disease and obesity
- Have a positive outlook and engage in supportive relationships



OUR PARTNERS

Alzheimer's Community Care

(Family Nurse Consultant) (Specialized Day Care)

Catholic Charities

(Children & Family Counseling Program)

Children's Emergency Resources

(Emergency Health Care Assistance)

Council on Aging (Adult Day Health Program)

D.A.T.A. (Youth Substance Abuse)

Deaf & Hard of Hearing Services of the Treasure Coast

(Dangerous Decibel Program)

Epilepsy Foundation of Florida

(Medical Services & Case Management)

Light of the World Charities (Little Light Dentistry)

Martin County Healthy Start Coalition (Client Services)

(Service Delivery)

Project L.I.F.T. (Substance Abuse Program)

Tykes & Teens (YES Program)

United Way of Martin County (CHARACTER COUNTS!)

YMCA (Youth Fitness Program)



OUR RESULTS

80%

of clients suffering

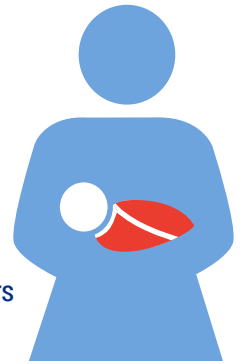
from epilepsy experienced a decreased seizure frequency as a result of increased access to care



75%

of women with a BMI of 25

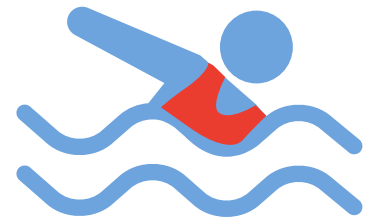
or more who received nutrition counseling services had a pregnancy weight gain within healthy parameters resulting in 94% of babies born at or above acceptable birth weight



123

children from low-income families

in Indiantown, where obesity rates are well above the national average, participated in swim lessons at least three times per week and other structured fitness activities to enhance physical activity



75%

of adults

who participated in counseling programs demonstrated a reduction in stress





MARTIN VOLUNTEERS

United Way of Martin County

Every community, regardless of the size and socioeconomic status, benefits greatly from volunteers.

While it is difficult to put an actual number to the measurable impact of volunteering, the benefits go beyond what some volunteers and donors realize. Community service has significant positive economic and social effects. For this reason, United Way of Martin County facilitates the Martin Volunteers program.

Through Martin Volunteers we recruit individuals, families, organizations and corporations and match them with meaningful volunteer opportunities at one of several nonprofit and public agencies. The goal is to make volunteering easy, flexible and impactful for the individual while helping agencies meet their goals.

United Way also provides direct services to Martin County residents through three internal projects under the Martin Volunteers umbrella:

- **White Doves Holiday Project:** provides food and toys during the holidays to families struggling to make ends meet
- **RSVP (Retired and Senior Volunteer Program):** engages people 55 or better in meaningful and challenging volunteer opportunities
- **Executive Service Corps of the Treasure Coast:** provides consulting services of highly skilled and experienced professionals to help nonprofits operate more efficiently and effectively



THANKS TO MARTIN VOLUNTEERS IMPACT IN OUR COMMUNITY...



1,119
volunteers contributed
84,551
hours which is
approximately
\$2 million
of volunteer service
for our community.



2,578
children were provided with
14,087
toys and
399
bikes through
United Way's White Doves
Holiday Project.



More than 150
volunteers assembled
3,500
hurricane preparation
kits that were distributed
to **Meals on Wheels**
clients and other vulnerable
residents prior to
hurricane season



70 RSVP
(Retired and Senior Volunteer
Program) volunteers coached
and mentored students at
5 local elementary schools
through **Caring Children Clothing**
Children's Literacy program;
89%
of participating students
improved their reading skills.



CHARACTER COUNTS!

United Way of Martin County

Founded in 1995, United Way of Martin County's CHARACTER COUNTS! program is a collaborative of community organizations, schools, businesses and individual citizens committed to the development and enhancement of individual and community character.

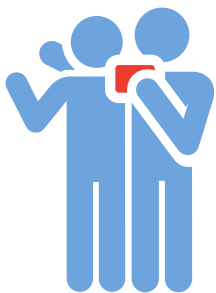
Our mission is to enhance and develop personal character and inspire all segments of the community to uphold the Six Pillars of Character: Trustworthiness, Respect, Responsibility, Fairness, Caring and Citizenship.

Martin County is a community committed to the principle that character counts. We believe that who you are makes a difference in personal relationships, in school, at the workplace, and in life. Character is not hereditary, nor does it develop automatically. It must be consciously developed by example and through the integration of character education throughout the community.

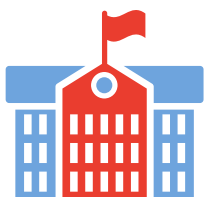
CHARACTER COUNTS! provides our community with resources, such as educational materials, recognitions, special events, and training opportunities, to develop, enhance and sustain a responsible, caring community. Some highlights from 2016–2017:



71 youth, adults, and businesses were recognized through the Joe Kordick Youth Character Awards, Business of Character Award, Employee Pillar of Character Award, and Student of the Week project.



\$8,800 in mini-grant funding was awarded to schools and non-profit agencies for character-building projects and projects addressing bullying prevention, youth substance abuse, and family involvement.



A full day CHARACTER COUNTS! training was offered to Martin County School District staff.



From top to bottom:

The Joe Kordick Youth Character Award Winners

Every kindergarten student in Martin County receives a CHARACTER COUNTS! T-shirt.

Business of Character Award winner Hooks Construction

TOP 10 MOST GENEROUS COMMUNITIES & WORKPLACES



United Way of Martin County

For the first time last year we released a ranking of the Top 10 most generous workplaces and communities whose employees and residents gave philanthropic contributions to and through United Way of Martin County during the previous fiscal year.

Publix Super Markets, a major employer in Martin County and a company well known for charitable giving, combined with the generosity of its associates, contributed nearly \$520,000 making it the No. 1 Most Generous Workplace.

While many United Ways rely heavily on workplace campaigns, the local gated communities in Martin County comprise more than half of the philanthropic giving to our annual campaign. The residents of Sailfish Point were honored with the title of Most Generous Community for contributing more than \$425,000.

MOST GENEROUS WORKPLACE

Publix Super Markets
\$520,000

MOST GENEROUS COMMUNITY

Sailfish Point
\$425,000

TOP 10 MOST GENEROUS WORKPLACES	TOP 10 MOST GENEROUS COMMUNITIES
1 Publix	1 Sailfish Point
2 Florida Power & Light Company	2 Harbour Ridge
3 Seacoast Bank	3 Loblolly
4 Raymond James	4 Willoughby
5 Martin Health System	5 Mariner Sands
6 Pratt & Whitney	6 Sewall's Point
7 Wells Fargo	7 Jupiter Hills
8 UPS	8 Sandhill Cove
9 Bank of America	9 Piper's Landing Yacht & Country Club
10 City of Stuart	10 Jupiter Island

United Way of Martin County TOCQUEVILLE SOCIETY



United Way created the Tocqueville Society for individuals who invest \$10,000 or more annually in their community. It is one of today's most prestigious giving societies in the world for individuals who are passionate about improving peoples' lives.

In 2016/2017, members of the Tocqueville Society collectively contributed more than \$1,000,000 in our local community.

Members of the Tocqueville Society were recognized at the annual Tocqueville Society reception held at Sailfish Point Country Club. Betty and Fred Kopf were awarded the Alexis de Tocqueville Outstanding Philanthropy Award at the reception, which was generously underwritten by Wilmington Trust.



Bob and Jan Crandall with Pres Blake



Peter Behr and Wendy Randall



Karen Rodgers and Frank Byers with Carol Houwaart-Diez



Linda and Tom Schaefer



Matt King and Debi Owens of Wilmington Trust, Carol Houwaart-Diez, Betty and Fred Kopf



Jeff and Deanna Atlas with Audrey and Bill Crandall



Dennis Longstreet, Karen Dakers and Dick Zappala

Alexis de Tocqueville was only 26 years old when he traveled extensively throughout the United States in 1831. His observations, readings, and discussions formed the basis of Democracy in America, a study of America society and politics.

One of his most important observations was that Americans hold in common a unique willingness to work for the public welfare – a tendency to lend faithful support to neighbors and countrymen, especially in times of need.

FOUNDATION CAMPAIGN UPDATE

Contributions of cash, pledges and legacy gifts

\$6 MILLION

UNITED WAY FOUNDATION

The **United Way of Martin County Foundation** is an independent public charity uniquely positioned to accept legacy gifts and build an endowment fund to meet the current and future unmet needs of Martin County.

Foundation Board of Directors

President

Thomas H. Thurlow III Esq., Thurlow & Thurlow, P.A.

Treasurer

Amy D. Chappel, CPA

Secretary

Carol G. Houwaart-Diez, President/CEO, United Way of Martin County

Charles R. Cleaver, CPA, MBA, Martin Health System

Hal Fenner, Retired Executive

Jean Laws-Scott, Esq., Law Offices of Jean Laws-Scott

Stephen A. Pinnacoli, Esq., LL.M., Thomas Pinnacoli Law

Robert Weissman, Retired Executive

Why a Foundation?

Many donors give generously to United Way of Martin County's annual campaign as a way to combat the daunting challenges our community is facing today. By leaving a legacy gift to the United Way Foundation, donors can continue to support our beloved community into the future.

The gift principal will be held in perpetuity with our Foundation as an endowment. Earnings from these endowment gifts will continue to grow and be used to support the community's future needs through the Foundation as a supporting organization of United Way of Martin County.

Funds are managed by a team of independent investment professionals under the watchful eye of an Investment Committee comprised of knowledgeable investment experts.

To date, over

25

individuals and families have entrusted the Foundation with legacy gifts ranging from

\$1,000
to over
\$1,000,000

in value, helping to ensure a brighter future for Martin County.

Foundation Honors Bill Lichtenberger

The Foundation honored Bill Lichtenberger with the 2017 Frances Langford Humanitarian Award. The award recognizes community leaders who, like Frances, demonstrate the care and compassion for humanity in their lives and in their actions. Bill Lichtenberger has been a longtime supporter of United Way. Last year, the Lichtenberger Family Foundation generously pledged \$1,000,000 to the United Way of Martin County Foundation as an endowment gift in addition to his previous gift of \$200,000. Proceeds of this endowment will benefit United Way of Martin County and United Way of St. Lucie County to meet the current and future needs of those communities.

The reception was generously underwritten by presenting sponsors Saelzer/Atlas Wealth Management Group of Raymond James and Wells Fargo.



Gerry Saelzer, Jeff Atlas, Ted Brown, Bill Lichtenberger, Todd Thurlow and Carol G. Houwaart-Diez

Changing the game through LEADERS UNITED

Founded in 2016, Leaders United is an affinity group for the United Way of Martin County comprised of passionate professionals who GIVE, ADVOCATE, and VOLUNTEER to further the mission of United Way. Through Leaders United, professionals have the opportunity to connect with others who are committed to their community, serve their community through hands-on service projects, and enhance leadership skills.



Leaders United was presented with a Hope Award from House of Hope

"When my family and I moved to Martin County three years ago we were immediately taken with the sense of community that is so prevalent here. This, of course, is best exemplified through The United Way of Martin County and all of the amazing agencies they support. To me, Leaders United is a natural extension of that spirit of giving. The model is simple - gather like-minded folks that are passionate about serving their community and give them a first-hand opportunity to do just that."

—Robert Allen Ankrom, Leaders United Membership Chair
Director of Communications, The Pine School

FINANCIAL INFORMATION

Financial Activities Fiscal Year Ending June 30, 2017

United Way of Martin County and United Way of Martin County Foundation

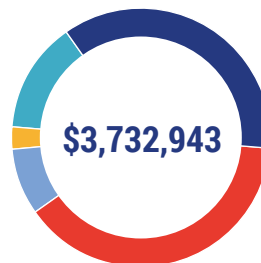
Financial Summary

During the 2016-2017 fiscal year, United Way of Martin County distributed over \$2.5 million in funding to local non-profit organizations supporting the needs of Martin County residents. In addition, the United Way of Martin County Foundation increased its endowment fund by nearly \$500,000 to support the future unmet needs of our residents.

United Way of Martin County values its fiduciary responsibility to donors, funders, and the community and strives to operate as efficiently as possible. Our current administrative expense rate is 16%.

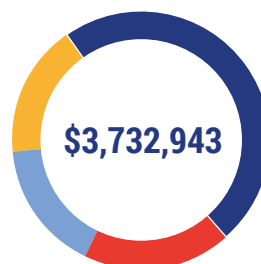
For complete financial information, our Audited Financial Report and IRS Form 990s are available for viewing at unitedwaymartin.org.

PUBLIC SUPPORT AND OTHER REVENUE



- Gifts from Individuals: **\$1,387,439**
- Corporate Partner & Employee Gifts: **\$1,458,398**
- Restricted Endowment Gifts & Gifts to UWMC Foundation: **\$315,863**
- Gifts from Foundations and Government Grants: **\$109,344**
- Investment Earnings and Other Revenue: **\$461,899**

EXPENSES, DISTRIBUTIONS AND RESERVES



- Community Program Service: **\$1,793,283**
- Donor Designations to Non-Profits Agencies: **\$711,197**
- Endowment, Reserves and Allowances: **\$599,735**
- Fundraising and Administration: **\$628,728**



THANK YOU

