



**IDENTIFY THE OBSTACLES.  
TAKE ON THE IMPOSSIBLE.**

**LIVE UNITED<sup>®</sup>**

*Janina, Daniel and Jadah  
former residents of  
Salvation Army of Martin County  
Compassion House*



United Way of Martin County

**2017–2018 COMMUNITY IMPACT REPORT**



# TABLE OF CONTENTS

- 1 A Message From United Way's Leadership
- 2-7 Impact Update
- 8 Martin Volunteers
- 9 CHARACTER COUNTS!
- 10 Top 10 Most Generous Workplaces and Communities
- 11 United Way of Martin County Tocqueville Society
- 12 United Way of Martin County Foundation
- 13 Leaders United Financial Information

## 2018-19 BOARD OF DIRECTORS AND STAFF



### United Way of Martin County Board of Directors

#### Officers

**Chair:** Denise Ehrich, *U.S. Trust*

**Vice Chair and Fund Distribution Chair:** Gene Zweben, Esq., *Zweben Law Group*

**Strategic Planning Chair:** Taryn Kryzda, *Martin County Board of County Commissioners*

**Treasurer:** Mark Roberts, *HBK*

**Campaign Chair:** Ademil Castrillo, *Wells Fargo*

**Secretary:** Carol G. Houwaart-Diez, *United Way of Martin County*

**Governance:** Amy Albury, *Florida Power & Light Company*

**Immediate Past Chair:** Chad Hastings, *Lesser, Lesser, Landy & Smith PLLC*

#### Directors

Khherri Anderson, *Martin County Supervisor of Elections*

Amy Bottegal, *CenterState*

Thomas Campenni, *Retired*

Jane Cebelak, *Retired*

Blake Davis, *Publix Super Markets*

Lt. Mike Dougherty, *Martin County Sheriff's Office*

Laurie Gaylord, *Martin County School District*

Geoff Lieberman, *Macy's, Jensen Beach*

Elliott Paul, *Elliott Paul & Company Auctions*

Lisa Peterson-Sanders, *MTM, Inc.*

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

Chuck Shaffer, *Seacoast Bank*

Ramona Thomas, *Martin Health System*

Rob Tweeddale, *Merrill Lynch, Ex-Officio CHARACTER COUNTS! Chair*

Dave Wishart, Ph.D., *United Technologies – Pratt & Whitney*

### United Way of Martin County Staff

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!*

Nancy McCarthy, *Director of Marketing and Communications*

Theresa Schineis, *Vice President of Finance and Administration*

Carlene Stangle, *Administrative Assistant*

Kathleen Stacey, *RSVP Director*

Rachel Terlizzi, *Community Outreach Coordinator*

## A Message From United Way's Leadership



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

United Way fights for the health, education and financial stability of every person in Martin County. We go beyond single-issue solutions and temporary fixes to impact thousands of lives each year – but we couldn't do it without you. By rallying together with our corporate partners, generous donors and tireless volunteers, we know that change is possible.

We are a community of neighbors helping neighbors, giving Martin County residents the tools they need to rise above the challenges and live a better life. By living united, we work to ensure that our community remains resilient, hopeful and filled with opportunity.

Because of you, children are thriving in school and reaching unprecedented levels of success, families are training for careers with growth potential and achieving financial independence, and those of all ages are encouraged to live a healthy lifestyle. By fighting for the education, financial stability and health of those with the most need, we create a better Martin County for us all.

Each year, our Community Impact Report is a chance to highlight the spectacular efforts we all made together toward our bold goals. We are able to fight this fight thanks to donors and volunteers, supporters like YOU, who sustain us financially and encourage us to keep striving to build a stronger, more caring community.

We hope you enjoy the report and remember, we have one life. To live better, we must **LIVE UNITED**.

Warm regards,

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

Denise Ehrich  
2018-19 Board Chair  
United Way of Martin County

### VISION STATEMENT

United Way of Martin County envisions a community where all individuals and families achieve their potential through education, financial stability and healthy lives.

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 improve lives by mobilizing the caring power of our community.

### WE WIN BY:

- Living united;
- Forging unlikely partnerships;
- Finding new solutions to old problems;
- Mobilizing the best resources; and
- Inspiring individuals to join us in tackling the most daunting social crises in our community.

## NEED MORE INFORMATION ABOUT UNITED WAY OF MARTIN COUNTY?

UnitedWayMartin.org  
772-283-4800



@UnitedWayMartin



# IMPROVE EDUCATION

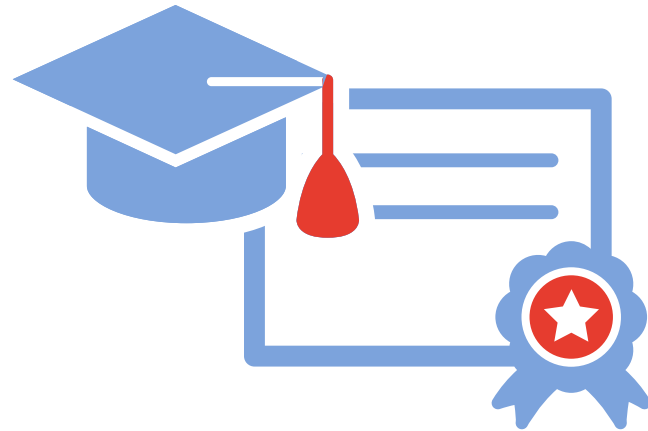
TOGETHER, WE ENSURE ALL CHILDREN ARE READY TO SUCCEED.



## OUR GOALS

Increase the number of children who:

- Start school ready to succeed
- Read on grade level by third grade
- Have acquired the skills for academic and social/emotional development
- Graduate from high school on time with a post-secondary plan or are prepared for work



## OUR PARTNERS

**ARC of Martin County**  
(Youth After School Camp)

**Boys & Girls Clubs of Martin County**  
(Teen Leadership Academy)

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

**Helping People Succeed** (Baby Steps)

**Hibiscus Children's Center**  
(Shelter Literacy Program)

**Hobe Sound Early Learning Center**  
(Increasing School Readiness)

**Hope Center for Autism** (Summer of Hope)

**Hope Rural School** (Hope After Hours)

**Martin County School District**  
(Summer Reading Camp) (Getting Ready for Kindergarten)

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

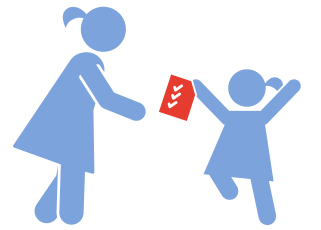
## OUR RESULTS

**100%**  
of the students



who completed the First Grade Summer Reading Camp made gains in one or more areas.

**93%**  
of students



enrolled in the Summer of Hope program at Hope Center for Autism demonstrated improved function and social skills.

**99%**  
of parents



enrolled in the Baby Steps program show increased parenting and child development knowledge.

When their son Brysen was 3 years old, Brent and his wife Brandi grew concerned about his development. After Brysen was clinically diagnosed with Autism Spectrum Disorder, they went through a lot of testing and research to find ways to help him.

That's when they came across the Hope Center for Autism, a charter school for children with autism and related disabilities, and decided to visit the center to meet some of the staff.

During the tour it was evident that the staff really cared about the students and wanted to spend time with each individual child. They decided Hope Center for Autism was a really good fit for what Brysen needed at the time.

During his time at the school, Brysen made such impressive gains that he "graduated" from the program and is now attending Bessey Creek Elementary School, which was the ultimate goal.

Thanks to United Way supporters, Brysen and thousands of other Martin County children are on the track to success. That's what it means to LIVE UNITED.



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



# SUPPORT FINANCIAL STABILITY

UNITED, WE SUPPORT OUR MOST VULNERABLE RESIDENTS



Shortly after Janina gave birth to her son, Daniel, she realized that her marriage of five years was an emotionally abusive relationship.

So, Janina moved with her two children to Martin County to stay with her sister for a just a couple of months.

When that was no longer an option, she started looking for housing and discovered United Way funded Compassion House at Salvation Army of Martin County, a transitional housing facility for women and their children who have fallen upon homelessness. The stay is typically about three to four months, which is enough time to help residents get back on their feet and find resources they couldn't connect with before.

The support from Compassion House was just what Janina needed to get back on track. Now Janina and her family live in their own place and they are thriving.

United Way supporters have helped Janina and thousands of other Martin County families create a better life. That's what it means to LIVE UNITED.

## OUR GOALS

Increase the number of individuals and families who:

- Have access to food, shelter, education and other income/work supports
- Move closer to financial independence
- Have access to jobs/job training and health and education initiatives that improve employability and retention



## OUR PARTNERS

**American Red Cross, Martin County Chapter** (Emergency Services Program)

**ARC of Martin County** (ABLE Program)

**ARC / HPS** (Project Search)

**Caring Children Clothing Children** (Financial Stability Clothing Program)

**Council on Aging** (Meals on Wheels)

**Helping People Succeed** (Community Living)

**House of Hope** (Project Hope) (Golden Gate Center for Enrichment)

**Legal Aid Society** (Core Program)

**Life Builders** (Building Lives, Protecting Community)

**Mary's Shelter** (Work Readiness)

**Project L.I.F.T.** (Transportation / Employment Supports) (Pre-Apprenticeship Certification Program)

**SafeSpace** (Domestic Violence Program)

**Salvation Army** (Basic Needs) (Compassion House)

**Treasure Coast Food Bank** (Whole Child Connection)

**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 and MyFreeTaxes helped

**320** individuals and families

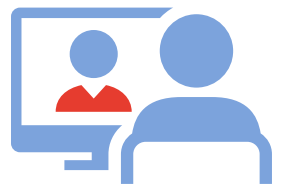
receive a total of \$349,519 in tax refunds.



Residents saved **\$126,044** on prescription costs in 2017, as a result of the successful partnership with FamilyWize Community Service Partnership.

**538**

Martin County residents were provided \$487,500 in free legal assistance.



Martin County families in need have saved

**\$116,235**

through a clothing voucher program.



**50**

families in need were provided vehicles and repairs saving them over \$84,000.



Your investment supports homebound seniors, like JD, who receive nutritious food through Meals on Wheels.



# PROMOTE GOOD HEALTH

TOGETHER, WE ARE CREATING SAFE AND HEALTHY COMMUNITIES



During Dominick's senior year of high school things started spiraling out of control. A series of poor decisions led him to become a client of the United Way funded YES program at Tykes & Teens.

The YES program gives local pre-teens and adolescents who are struggling with alcohol, drugs, or other dangerous behaviors the chance to make long term change.

Through a combination of individual, family, and group counseling, teens learn the coping skills necessary to manage peer pressure, anxiety, depression and other challenges without resorting to unhealthy behavior.

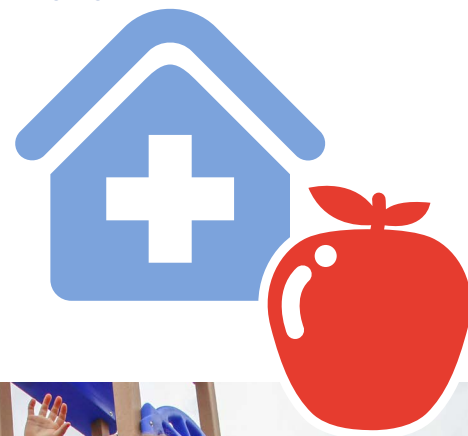
Thanks in part to the support he received from this program, Dominick graduated high school and is currently attending Florida State University.

United Way supporters helped put Dominick and thousands of other Martin County youth on the path to fulfilling their dreams. That's what it means to LIVE UNITED.

## OUR GOALS

Increase the number of youth and adults who:

- Have access to necessary healthcare services – including preventative, maternal, pediatric, mental, dental, pharmaceutical and vision – provided in a coordinated way to produce the best results
- 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** (Children's Medical Program)
- 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)
- Helping People Succeed** (Behavioral Services)
- House of Hope** (Client Choice Pantry)
- Light of the World Charities** (Little Light Dentistry)
- Martin County Healthy Start Coalition** (Client Services) (Service Delivery)
- Martin County School District** (Head Start)
- Treasure Coast Food Bank** (Backpack Program) (School Pantry Program)
- Project L.I.F.T.** (Substance Abuse Program)
- Tykes & Teens** (YES Program)
- YMCA** (Youth Fitness Program)

## OUR RESULTS

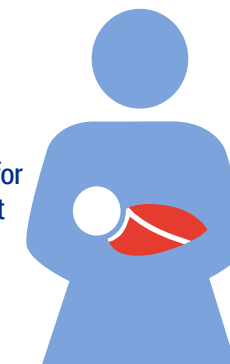
**17,000** meals and 4,200 backpacks

have been distributed to food insecure families through the School Pantry Program.



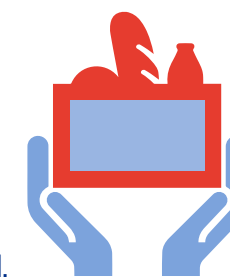
**96%** of infants

born to clients in the Prenatal Care for the Uninsured Program were born at or above acceptable birth weight.



**95%**

of pantry clients indicated that they increased their knowledge on selecting and preparing healthy food.



**85%** of families

who have a loved one with Alzheimer's have been able to delay nursing home placement through a specialized day care program.





**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.

Through United Way's Martin Volunteers program 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



**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.

By providing our community with resources such as educational materials, recognitions, special events, and training opportunities that develop, enhance, and sustain a responsible, caring community, the impact of CHARACTER COUNTS! is far-reaching. Some highlights from 2017 – 2018:



**60** youth, adults, and businesses were recognized through the Joe Kordick Youth Character Awards, Business of Character Award, Student of the Week project and the Martin County School District Caring Employee Award.



**7,300** children, clients, staff and volunteers were impacted by character development lessons and activities that local non-profit agencies, youth organizations and shelters implemented regularly.



**6,800** lives were touched through \$10,500 in mini-grant funding that was awarded to school and non-profit agency staff for character-building projects and projects addressing bullying prevention, youth substance abuse, and family involvement.

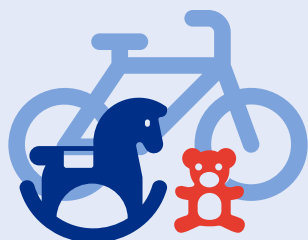


**From top to bottom:**  
 Business of Character Award Winner, MIS Consulting (sponsored by Martin Health System and the Business Development Board of Martin County)  
 Martin County School District Mini-Grant Recipients  
 Every kindergarten student in Martin County receives a CHARACTER COUNTS! T-shirt. Pictured: Warfield Elementary School students (sponsored by Lively Orthodontics and Ampersand Graphics / Shirt Shack)

## HERE'S HOW MARTIN VOLUNTEERS IMPACTED OUR COMMUNITY...



**1,560** volunteers contributed **95,995** hours which is approximately **\$2.3 million** of volunteer service for our community.



**2,737** children were provided with **14,335** toys and **384** bikes through United Way's White Doves Holiday Project.



**91%** of Meals on Wheels clients surveyed agreed that not only do they look forward to seeing volunteers, the service allows them to remain living in their own home.





# TOP 10 MOST GENEROUS COMMUNITIES & WORKPLACES

United Way  
United Way of Martin County

For the second year, we released a ranking of the Top 10 most generous workplaces and communities whose employees and residents gave philanthropic contributions to 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 \$535,882 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 nearly 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 \$399,444.

**MOST GENEROUS WORKPLACE**

**Publix Super Markets**  
**\$535,882**

**MOST GENEROUS COMMUNITY**

**Sailfish Point**  
**\$399,444**

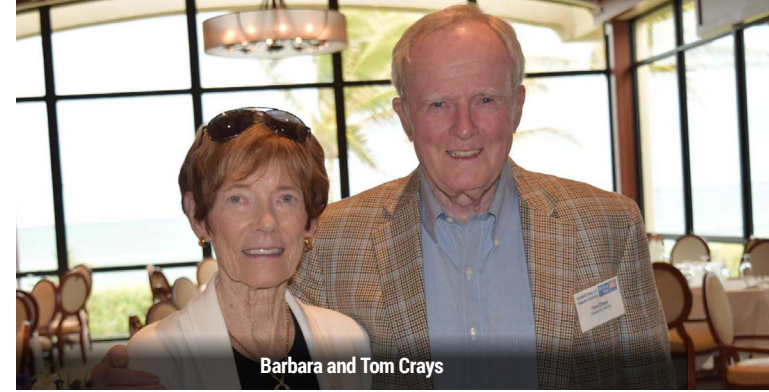
- | TOP 10 MOST GENEROUS WORKPLACES | TOP 10 MOST GENEROUS COMMUNITIES       |
|---------------------------------|--|
| 1 Publix                        | 1 Sailfish Point                       |
| 2 Florida Power & Light Company | 2 Harbour Ridge                        |
| 3 Seacoast Bank           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

**United Way of Martin County TOCQUEVILLE SOCIETY**

United Way's Tocqueville Society is one of the most prestigious giving societies recognized throughout the world. These passionate members invest \$10,000 or more in their community annually in support of United Way's mission to improve people's lives.

In 2017/2018, members of United Way of Martin County's Tocqueville Society contributed over \$1.24 million to fight for the health, education and financial stability of every person in Martin County.

Tocqueville Society members were recognized for their philanthropy at the annual Tocqueville Society reception held at Sailfish Point Country Club. Dennis and Linda Longstreet were awarded the Alexis de Tocqueville Outstanding Philanthropy Award at the reception, which was generously underwritten by Wilmington Trust.



**Who was Alexis de Tocqueville?**  
Only 26 years old when he traveled extensively throughout the United States in 1831, Alexis de Tocqueville's 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**

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

**Chair**

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

- Thomas Campenni, United Way Board Representative
- Charles R. Cleaver, CPA, MBA, Martin Health System
- Richard Dakers, Retired Executive
- Hal Fenner, Retired Executive
- Stephen A. Pinnacoli, Esq., LL.M., Keane Thomas & Pinnacoli
- Robert Weissman, Retired Executive

### Frances Langford Humanitarian Award

United Way of Martin County Foundation honored Bob & Jan Crandall and Bill & Audrey Crandall with the 2018 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. Both couples were honored for their ongoing philanthropic endeavors benefiting United Way, as well as other nonprofits. The Crandalls have been members of the United Way Tocqueville Society for over a decade. Tocqueville members invest \$10,000 or more annually in the community through United Way.

The reception was generously underwritten by presenting sponsors Saelzer/Atlas Wealth Management Group of Raymond James and U.S.Trust, Bank of America Private Wealth Management.

### Why a Foundation?

By leaving a legacy gift to the United Way Foundation, donors can continue to support our 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 the United Way of Martin County.

Funds entrusted to the Foundation are managed by a team of independent investment professionals with oversight from the Foundation's Investment Committee, which is comprised of investment experts.

As United Way of Martin County is always working to ensure we are positioned to respond to the priority needs of our community, both now and in the future, the endowment provides long-term financial security to address those future needs.

**WAYS TO GIVE**

- Charitable Bequest
- Retirement Plan
- Life Insurance
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Retained Life Estate

If you have already included United Way of Martin County Foundation in your will or estate plan, please notify us to be recognized as a member of the esteemed Legacy Society.



Bob and Jan Crandall with Audrey and Bill Crandall

Created 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, this group continues to make an impact in their local community.

*"When I got involved with Leaders United, I found myself surrounded by truly great people that not only have fun, but come together to help our community. I have been involved since the group began and I'm proud and excited to be leading its efforts this year."* – Amy Bottegal, Leaders United Steering Committee Chair



Leaders United volunteers at the Salvation Army of Martin County

### TIKIS ON THE TERRACE



Leaders United helped coordinate the inaugural Tikis on the Terrace luau themed fundraising event. The event raised \$17,000 for Martin County's Literacy Initiatives.

## FINANCIAL INFORMATION

Financial Activities Fiscal Year Ending June 30, 2018

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

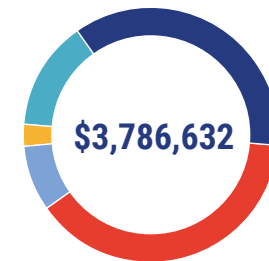
#### Financial Summary

During the 2017-2018 fiscal year, United Way of Martin County provided over \$2.9 million in program services and funding to support the needs of Martin County 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 14.67%.

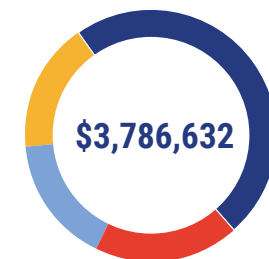
For complete financial information, our Audited Financial Report and IRS Form 990s are available for viewing at [unitedwaymartin.org](http://unitedwaymartin.org).

#### PUBLIC SUPPORT AND OTHER REVENUE



- Gifts from Individuals: **\$1,167,580**
- Corporate Partner & Employee Gifts: **\$1,504,609**
- Restricted Endowment Gifts & Gifts to UWMC Foundation: **\$460,591**
- Gifts from Foundations and Government Grants: **\$105,844**
- Investment Earnings and Other Revenue: **\$548,008**

#### EXPENSES, DISTRIBUTIONS AND RESERVES



- Community Program Services: **\$2,308,209**
- Donor Designations to Non-Profit Agencies: **\$614,693**
- Endowment, Reserves and Allowances: **\$317,335**
- Fundraising and Administration: **\$546,395**





THANK YOU



**100% OF THE COMMUNITY IMPACT REPORT PRODUCTION COSTS WERE GRACIOUSLY UNDERWRITTEN BY THE FOLLOWING SPONSORS:**

