



United Way of Martin County



2021

COMMUNITY IMPACT REPORT



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 improve lives by mobilizing the caring power of our community.

NEED MORE INFORMATION ABOUT UNITED WAY OF MARTIN COUNTY?

UnitedWayMartin.org

772-283-4800

@UnitedWayMartin



Scan to give

BOARD OF DIRECTORS

Officers

Chair: Kherri Anderson, *Martin County Supervisor of Elections*

Chair-Elect & Fund Distribution: Geoff Lieberman, *Macy's, Jensen Beach*

Treasurer: Mark Roberts, CPA, *HBK CPAs and Consultants*

Secretary: Elliot Paul, *Elliot Paul & Company Auctions*

Immediate Past Chair: Gene Zweben, Esq., *Zweben Law Group*

Directors

Kathryn (Muffin) Adamiak, *Retired*

Michael Borlaug, *Capstone IT*

Amy Bottegal, *SouthState*

Thomas Campenni, *Retired*

Mary Anne Cannon, *Pratt & Whitney*

Blake Davis, *Publix Super Markets*

Bryan Garner, *Florida Power & Light Company*

Charles Geary, Esq., *Lesser, Lesser, Landy & Smith, PLLC*

Tammy Matthew, *Bank of America*

Dr. John Millay, *Martin County School District*

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

Jennifer Salas, *Martin County Board of County Commissioners*

Chuck Shaffer, *Seacoast Bank*

Joseph Tumminelli, *City of Stuart Police Department*

Dave Wishart, Ph.D., *Sikorsky*

Yvette Zamoyski, *Wells Fargo*

UNITED WAY OF MARTIN COUNTY STAFF

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

Sara Aviles, *Impact Coordinator*

Ellen East, *Finance Assistant*

Elisabeth Glynn, CFRE, *Director of Philanthropy*

Nancy McCarthy, APR, *Director of Marketing and Communications*

Tom Munhollen, *Business Development Coordinator*

Theresa Schineis, *Vice President of Finance and Administration*

Kathleen Stacey, *Director of AmeriCorps Seniors*

A MESSAGE TO OUR COMMUNITY

Communities are best defined by how people care for one another in trying times. Over the last year, we were heartened to witness people rising to the challenge of being part of caring communities -- People giving up their free time to volunteer at vaccine clinics or to deliver food to the elderly. Teachers working overtime to help kids make up learning losses from the pandemic. First responders who did not miss a shift despite the sickness and sorrow that surrounded them daily. The resilience, collaboration, and generosity our community has shown during the last year really reinforced why Martin County is such a special place.

At a time when our community faced much uncertainty, our investments in the community have never been greater. The examples of philanthropy and volunteerism we've seen this year are what keep a community together, and we are beyond proud of the accomplishments we share. Over the last year, we helped local families by:

- Ensuring they could put healthy food on their tables;
- Making sure they had safe and affordable childcare and their children had access to enrichment activities; and
- Getting them on more solid financial footing and helping them put some money in the bank.

A further example of the crucial role United Way plays within our community is how we have helped mobilize and manage aid. In 2021, we expanded our partnership with the Martin County Board of County Commissioners to be the managing entity for the American Rescue Plan Act Grants (ARPA). This includes Community Assistance Program (CAP) funding available for workforce development, mental health services and capital expenditures that can increase capacity for our nonprofit community in times of disasters or pandemics. In addition, we were asked to manage the Community Partner Relief (CPR) grants which are operational grants for our nonprofit community that have suffered revenue declines directly related to COVID.

While the pandemic relief efforts were extraordinary, it is amazing that these programs are only one facet of our work during this past year. As Martin County students headed back to school for in-person learning -- many for the first time in over a year -- they were provided with the school supplies they needed thanks to the United Way of Martin County Tools for Success program. And, despite all of the challenges that threatened to play Grinch with holiday toy donations, the Christmas magic supply chain was again at full capacity at the United Way Holiday Project. We also launched a new program this year to inspire the next generation of leaders -- Students United -- to provide opportunities for local students to impact our community through service and advocacy.

Thank you to every individual, agency, organization, and corporation that has supported United Way and our local community. You are the reason we know our future is bright. We are STRONGER UNITED.

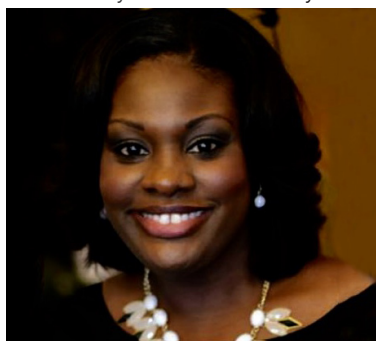
Warm regards,



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



Kherri C. Anderson
Board Chair
United Way of Martin County



FUNDED PROGRAMS

In Martin County, 33 percent of all households are **Asset Limited, Income Constrained, Employed** ... we know them as ALICE.

They are hardworking families who, although they are employed, are not always able to cover basic needs like food, housing, childcare, health care and transportation. An additional 11 percent live in poverty, bringing the total to 44 percent of households in our community struggling to get by each and every day.

To create economic opportunity, United Way of Martin County's work is focused on **education, financial stability and health** – the building blocks for a good life. That's because we know that children do better in school and in life when they have access to quality education; families are more financially secure when they have the skill sets to land and keep good jobs; and everyone has a shot at a more productive life when they have access to affordable, quality health care.

EDUCATION

- ARC of Martin County
Youth After School Program
- Boys & Girls Clubs of Martin County
K-8 Academic Success
- Caring Children Clothing Children
Reading on Wheels
- Dunbar
Butterflies Voluntary Pre-Kindergarten (VPK) Program
- Helping People Succeed
Baby Steps
- Hibiscus Children's Center
Shelter Literacy Program
- Hobe Sound Early Learning Center
Increase School Readiness
- Hope Center for Autism
Surviving Social Situations
- Hope Rural School
Parent Outreach
- Humane Society of the Treasure Coast
Paws to Read
- Martin County School District
Getting Ready for Kindergarten
- United Way of Martin County
Tools for Success
CHARACTER COUNTS!

Thank you to our Education Impact Sponsor Florida Power & Light Company

HEALTH

- Alzheimer's Community Care
Family Nurse Consultant
Specialized Day Care
- Catholic Charities
Children & Family Counseling
- Children's Emergency Resources
Children's Medical Program
- Council on Aging
Adult Day Health Program
- D.A.T.A.
Youth Substance Abuse
- Epilepsy Foundation of Florida
Medical Services & Case Mgmt
- House of Hope
Client Choice Pantry
- Light of the World Charities
Little Lights Dentistry
- Martin County Healthy Start Coalition
Healthy Start Services
- Project Lift
Substance Abuse
- Suncoast Mental Health
SOS Program
- Tykes & Teens
Social Communicative Competence
YES Program
- United Way of Martin County
Volunteer United
- YMCA
Youth Soccer Program

Thank you to our Health Impact Sponsor Cleveland Clinic Martin Health

FINANCIAL STABILITY

- 211 of the Treasure Coast
Crisis and Community Hotline
- ARC of Martin County
ABLE Program
- Caring Children Clothing Children
Clothing Program
- Children's Home Society
Children in Need of Services
- Council on Aging
Meals on Wheels
- Helping People Succeed
Community Living
- House of Hope
Golden Gate
Project Hope
- Life Builders
Building Lives, Protecting Community
- Mary's Home of the Treasure Coast
Pregnancy Shelter
- Project Lift
Pre-Apprenticeship Certification
Transportation & Employment
- SafeSpace
Domestic Violence Shelter
- Salvation Army
Basic Needs
Compassion House
- United Way of Martin County
VITA

OUR INITIATIVES

STUDENTS UNITED

During a most remarkable year amidst a global pandemic, United Way of Martin County launched an innovative new program to cultivate the next generation of philanthropic pioneers. The inaugural class of Students United was comprised of six students from the four Martin County high schools. Student members met monthly to learn about the community's needs and how United Way works to improve education, financial stability and health. They also participated in volunteer opportunities and served on a United Way citizen review panel to help decide where United Way funds are invested.



TOOLS FOR SUCCESS

This year marks the third year that United Way of Martin County has been helping families prepare for the school year by providing the basic school supplies for Martin County students. Through Tools for Success, more than **17,340** Martin County students began the school year with over **414,000** of the most needed supplies, saving local families nearly **\$333,000** in school supply costs. School supplies were delivered directly to Martin County schools to ensure that no student started school empty handed without the needed supplies.



UNITED WAY HOLIDAY PROJECT

For more than 30 years, United Way of Martin County has helped bring Christmas to thousands of children and their families who are facing hard times by providing toys and a traditional holiday meal. The holiday cheer was needed this year more than ever as families faced economic pressures and many couldn't afford the extra expense of a holiday dinner and toys on top of the regular necessities. This year, the United Way of Martin County distributed **12,342** toys for **1,506** children. Each family was also provided with a turkey and a bag of groceries filled to the brim with the staples for a traditional holiday meal.



FOUNDATION UPDATE

\$8.9 MILLION

As of June 30, 2021, United Way of Martin County Foundation had net assets totaling **\$6,545,892** and additional legacy gift intentions of **\$2,362,000**.

Foundation Board of Directors

Chair: Stephen A. Pinnacoli, Esq., LL.M., Keane Thomas & Pinnacoli

Vice Chair: Dennis Longstreet, Retired Executive

Treasurer: Gregory R. Nuttall, CPA, HBK CPAs and Consultants

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

Thomas Campenni, Retired Executive

Charles (Chuck) R. Cleaver, CPA, MBA, Retired Executive

John Loewenberg, Retired Executive

Randy Pennington, SouthState

Carol Webb, Retired Executive

Honorary Board: Robert Weissman, Retired Executive

The **United Way of Martin County Foundation** is a supporting organization for United Way of Martin County. The Foundation is an independent public charity positioned to accept legacy gifts and build an endowment fund to meet the current and future unmet needs of Martin County. In times of crisis or disaster, the Foundation is there to provide financial support to United Way of Martin County to assist with the needs of the community.

As we have seen over the years, the community's needs do not go away. They evolve. What might have been a significant issue in the past may no longer be an issue today. And there is no true way to predict what the community's future needs will be.

2022 marks United Way of Martin County's 50th anniversary of caring for our community. A gift to the endowment fund creates a lasting legacy while allowing United Way of Martin County to care for our community for the next 50+ years.

What is an endowment?

An endowment is a permanent fund that is carefully invested for growth. It provides a dependable revenue stream year after year. Gifts to the endowment remain intact and the investment return is available annually to support the mission of an organization. Funds held by United Way of Martin County Foundation are professionally managed and are monitored by a volunteer Board of Directors.

Donors can leave a lasting legacy through wills and bequests as well as other planned gifts.

Visit www.UnitedWayMartin.org/GiftOptions for more information.



TOCQUEVILLE SOCIETY

The Alexis de Tocqueville Society is United Way's most prestigious giving society and is recognized throughout

the world. Members of the Tocqueville Society make an annual investment of \$10,000 or more in support of United Way's mission to improve people's lives.

With nearly **80** members, the Tocqueville Society contributed **\$1,241,333** in the last fiscal year to lead the fight for health, education, and financial stability of every person in Martin County.

Also, several members of the Tocqueville Society served as volunteers on the Citizen Review Panels to help assess which local community programs would receive United Way funding.

The Tocqueville Society Reception was held at Sailfish Point Country Club to acknowledge the collective philanthropic impact of these passionate donors. Charlie and Gerry Ruibal were awarded the Alexis de Tocqueville Outstanding Philanthropy Award at the reception, which was generously underwritten by Wilmington Trust.



Noreen Fisher, Charlie and Gerry Ruibal, Muffin Adamiak

TOP 10 MOST GENEROUS COMMUNITIES & WORKPLACES



United Way of Martin County

We once again 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.

Publix Super Markets, a notable employer in Martin County and a company well known for charitable giving, combined with the generosity of its associates, contributed \$503,696 once again solidifying its spot as the No. 1 Most Generous Workplace.

Not only is Publix ranked as the top supporter locally, they are now United Way's top supporter globally.

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 once again honored with the title of Most Generous Community for contributing \$498,624.



TOP 10 MOST GENEROUS WORKPLACES

- 1 Publix Super Markets
- 2 Seacoast Bank
- 3 Florida Power & Light Company
- 4 Pratt & Whitney
- 5 Cleveland Clinic Martin Health
- 6 Martin County Board of County Commissioners
- 7 City of Stuart
- 8 Boys & Girls Clubs of Martin County
- 9 Martin County School District
- 10 Raymond James

TOP 10 MOST GENEROUS COMMUNITIES

- 1 Sailfish Point
- 2 Harbour Ridge
- 3 Willoughby
- 4 Piper's Landing
- 5 Loblolly
- 6 Jupiter Island
- 7 Sandhill Cove
- 8 Jupiter Hills
- 9 Mariner Sands
- 10 Sewall's Point

United Way of Martin County is a Top 10 Most Generous Workplace but is excluded from the listing.

FINANCIALS

UNITED WAY OF MARTIN COUNTY SCHEDULE OF ACTIVITIES for year ended June 30, 2021

Public support, grants, and other revenue	\$3,489,813
Less: Amounts raised on behalf of others (designated gifts)	(409,529)
Less: Provision for uncollectible pledges	(150,000)
CARES Act Assistance	3,979,678
Total support and revenues	<u>6,909,962</u>
Program service expenses	6,226,135
Supporting services	405,269
Total expenses	<u>6,631,404</u>
Change in Net Assets	<u>278,558</u>
Net assets - June 30, 2020	880,508
Net assets - June 30, 2021	<u>\$1,159,066</u>

United Way of Martin County values its fiduciary responsibility to donors, funders, and the community and strives to operate as efficiently as possible. On average 85 cents of every dollar raised is invested in local programs and services.

Audited financial statements and IRS Form 990 are available for review online: UnitedWayMartin.org



12,430 people received services that provide comprehensive basic needs



12,001 people received services that foster financial stability



22,827 people were connected to critical resources through **2-1-1**



7,898 people received services that promote good health and well-being



460 tax returns filed for **free** saving families **\$101,200** in preparation fees



17,340 students received supplies needed to succeed in school



668 volunteers mobilized, providing **55,976 hours** of service to our community

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

