

ANNUAL REPORT

2022-2023



**United Way of
St. Lucie & Okeechobee**

**United
Way**



BOARD OF DIRECTORS

James Bower, Publix Supermarkets
Robert Bysse, Harbour Ridge Yacht & Country Club
Jeff Emmeluth, Craig Jefferies Wealth Management
Thomas Epsky, State of Florida
Vanessa Farnes, Seacoast Bank
Michelle Franklin, St. Lucie County Property Appraiser's Office
Aneisha Graydon, Florida Power & Light
Mindy Howes, Nuttall, Donini & Associates, CPAs
April King, Coca Cola Beverages Florida
Jennifer Lafferty, SouthState Bank
Lori Match, Tradition Hospital
Jack Nash, Okeechobee County Sheriff's Office
Kevin G. Perry, PhD., St. Lucie County Public Schools
Rachel Tennant, Fort Pierce Utilities Authority
Shelly Thomas, St. Lucie County Property Appraiser's
Rhonda Wigglesworth, St. Lucie County Sheriff's Office
Elijah Wooten Jr., City of Port St. Lucie

United Way of St. Lucie
&
Okeechobee

Follow us!

www.uwslo.org
772-464-5300



STAFF

Thomas Epsky, President & CEO
Lorina Beniamino, Director of Community Partnership School
Tatum Kelley, Director of Development
Jeff Howard, Director of Collaborative Impact
Dolores Jensen, Family & Community Engagement Coordinator
Jason Meyer, Expanded Learning Coordinator
Esperanza Morales, Director of Finance & Administration
Avery Tomlinson, Director of Community Engagement
Yolanda Vicens-Rosario, Campaign & Finance Assistant



Mission Statement

To improve lives by mobilizing the caring power of our community.

Vision Statement

The United Way of St. Lucie County & Okeechobee will be the catalyst to achieve a sustainable community in the areas of health, education, and financial independence.



DAY OF CARING

Day of Caring is an annual community-wide effort that brings together volunteers and local businesses to provide short term, project-focused volunteer service with non-profit and public organizations to experience the intrinsic rewards of contributing to the well-being of our region.



MESSAGE FROM THE CHAIR

"We make a living by what we get, but we make a life by what we give."
-Winston Churchill



Come LIVE UNITED

Shelly Thomas, Board Chair
St. Lucie County Property Appraiser

The United Way of St Lucie and Okeechobee (UWSLCO) is committed to the mission of continuously improving the lives of our residents. We continue to connect with our partners in the community, collect impact data reports semiannually from our funded programs, and welcome individuals to participate in our citizens review panels. By continuing to have these community conversations, we keep a pulse on our community needs.

Our commitment to ALICE (Asset Limited, Income Constrained, Employed) families also remains strong. We understand that not everyone is able to make a living with what they get. Many of our fellow St Lucie and Okeechobee residents, though employed, are still unable to take care of some of life's basic needs. Each day as I buy groceries, pay common household bills, I think about ALICE. Do you know ALICE?

Throughout this past year the UWSLCO funded programs have supported over 227,000 individuals. Our dental program saw a 150% increase in the number of children served year over year! I am proud to be part of an organization that continues to invest dollars in programs that empower our youth through education, improve access to healthcare, and connect families and individuals to financial stability and basic needs resources. We are fully invested in improving lives with what we give.

None of these impacts could be possible without the collaboration and caring power of our community. To my fellow dedicated board members, I say thank you. Through challenges and changes you remained steadfast to the mission. To our volunteers, and especially our kind donors – your time and dollars help to put fuel in our engines. Thank you for your commitment. Without you we would not be able to move the needle closer to fulfilling the vision of a sustainable community.

However, if you were fortunate to have served on our Citizens Review Panel this year, you know that the needs were many. Inflation is raging, housing costs are soaring, and the mental health crisis is threatening to rip the fabric of many families and classrooms apart. I implore you to join in the movement to be a catalyst for change in St Lucie and Okeechobee. All the money we raise stays right in your community. I invite you to give, advocate, volunteer.

MESSAGE FROM OUR PRESIDENT & CEO

At United Way of St. Lucie & Okeechobee we believe that improving lives occurs by mobilizing the caring power of our community. For over 60 years, we have proved that when we LIVE UNITED, we can bring about positive long-lasting change that creates the access and opportunity for all our neighbors to thrive. Thanks to supporters like you, together we improved access to education, income, and health to residents of St. Lucie and Okeechobee; improvements that measurably change the paths for individuals and families in all areas of the community.

As I reflect on the past year and transitioning from many years of service on the board of directors to becoming president and CEO, I cannot help but feel tremendous gratitude for everyone who has supported our mission along the way. Whether it be through a financial contribution or by hours spent promoting our work in the community, I am honored to be a member of United Way of St. Lucie & Okeechobee.

However, the work is never over. With inflation, economic uncertainty, and political unrest across the globe, we need your help more than ever. Too many families in our community are working paycheck-to-paycheck. They are often forced to choose between a healthy meal and a tank of gas in their car. None of our neighbors should be forced to live in unhealthy conditions because they cannot afford medication or the rising electric bill. We can fix this, but only if we work together.

With pride in the past and faith in the future, there is no better time than to join us right now! I look forward to working with you in 2024.



Thom Epsy
President & CEO

PROGRAM PARTNERS



United Way of
St. Lucie & Okeechobee

BASIC NEEDS

GraceWay Village
GraceWay Village
United Against Poverty
Crisis Stabilization
Life Builders of the Treasure Coast
Life Builders of the Treasure Coast
Council on Aging
Caregiver Support
Real Life Children's Ranch
Professional House Parents

Mustard Seed Ministries
Mustard Seed Ministries
Mustard Seed Ministries
Sarah's Kitchen - Soup Kitchen
Salvation Army
Basic Needs
211 Palm Beach Treasure Coast
Community Resources

EDUCATION

**Big Brothers, Big Sisters of St. Lucie,
Indian River &
Okeechobee Counties**
Launching Into Literacy
**Early Learning Coalition of Indian River,
Martin & Okeechobee**
Literacy Coach
Early Learning Coalition of St Lucie County
School Readiness for ALICE Families

Okeechobee Education Foundation
Education Foundation of Okeechobee
PACE Center for Girls
*Intervention & Prevention Day
Programs*
Roundtable of St. Lucie County
IGNITE Youth Alliance
YMCA of the Treasure Coast
Drumbeat Program

FINANCIAL STABILITY

Arc of St. Lucie County
Adult Day Program
Helping People Succeed
Successful Futures

Mustard Seed Ministries
Planning Your New Future
United Against Poverty SLC
STEP

HEALTH

Alzheimer's Community Care
Specialized Alz. Daycare
Inner Truth Project
S.H.I.P Services
Project Lift
Project Lift Ft. Pierce
Helping People Succeed
Children's Mental Health
Healthy Start Coalition of SLC
Newborn Home Visitation
Healthy Start Coalition of SLC
Nurse Family Partnership

Healthy Start Coalition of Okeechobee
Connect Referral Program
Hibiscus Children's Center
Community Mental Health
Light of the World Charities
Little Lights Dentistry
Florida Department of Health
Sunny Smiles

OUR IMPACT

IN 2022-2023
WE CAME TOGETHER TO
PROVIDE

EDUCATION

\$95,950.00
4 PROGRAMS



\$190,732
6 PROGRAMS

BASIC NEEDS

HEALTH

\$227,569
10 PROGRAMS



\$98,130
3 PROGRAMS

FINANCIAL STABILITY

\$675,681

INVESTED IN OUR LOCAL
COMMUNITY



United Way of
St. Lucie & Okeechobee



TOP 10

MOST GENEROUS WORKPLACES

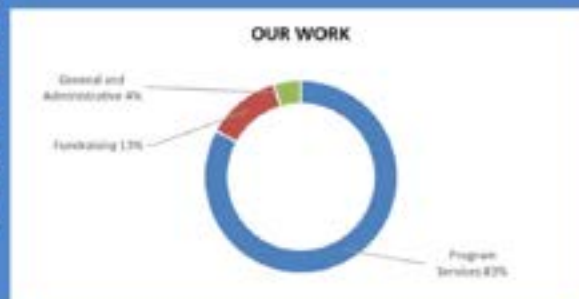
- 1 Publix Super Markets
- 2 Bernard A. Egan Foundation
- 3 Florida Power & Light
- 4 Seacoast Bank
- 5 St. Lucie County Administration BOCC
- 6 Freewill
- 7 Bank of America
- 8 City of Port St. Lucie
- 9 School Board of St. Lucie County
- 10 St. Lucie County Property Appraiser's Office



Public support, grants, and other revenue	\$1,590,976
Less: Amounts raised on behalf of others (designated gifts)	(152,475)
Less: Provision for uncollectible pledges	(127,145)
Total support and revenues	1,311,356
Program service expenses	1,223,624
Fundraising	185,371
General and Administrative	66,443
Total expenses	1,475,438
Change in Net Assets	(164,082)

Net assets - July 1, 2023	\$3,233,875
Net assets - June 30, 2023	\$3,069,793

FINANCIALS





TOCQUEVILLE SOCIETY

2022-2023
\$429,443.71

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.

The 13 members of the Tocqueville Society contributed \$429,443.71 in the last fiscal year to lead the fight for health, education, and financial stability of every person in St. Lucie & Okeechobee.



HARBOUR RIDGE
 YACHT & COUNTRY CLUB

2022-2023

**Top Philanthropic
 Gated Community**



COMMUNITY PARTNERSHIP SCHOOL

A Community Partnership School has been established at White City Elementary. Community Partnership Schools improve student outcomes by transforming schools into resource hubs that offer a range of supports and opportunities to children, families and the surrounding neighborhood.

Community Partnership Schools focus on academics, health, social services and community engagement.

FACT: Community Partnership Schools lead to improved student learning, stronger families and healthier communities



TOOLS FOR SCHOOLS

Tools for Schools St. Lucie serves the need of children throughout the St. Lucie Public School system by providing donated school supplies. This rewarding opportunity not only helps the students but the teachers by alleviating the worry of inequity when planning classroom projects.

Tools for Schools believes every student should have the access to the tools they need to succeed, regardless of income.

FACT: 674 teachers receive more than \$76,243 in supplies to benefit more than 14,000 students each year.

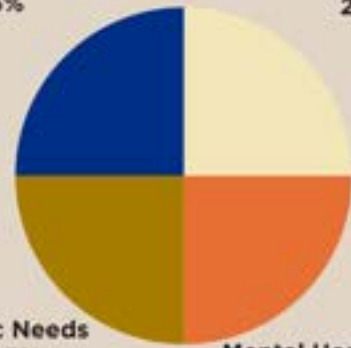


COMMUNITY PARTNERSHIP SCHOOL



Family Engagement
25%

Educational Help
25%



Basic Needs
25%

Mental Health & Wellness
25%

Focus Areas

Family Engagement Nights

All Pro Dad

Men in Training

Family Fun Fairs

Sustainable garden

Teacher Appreciation

Reading Nights

Community Resource Fairs



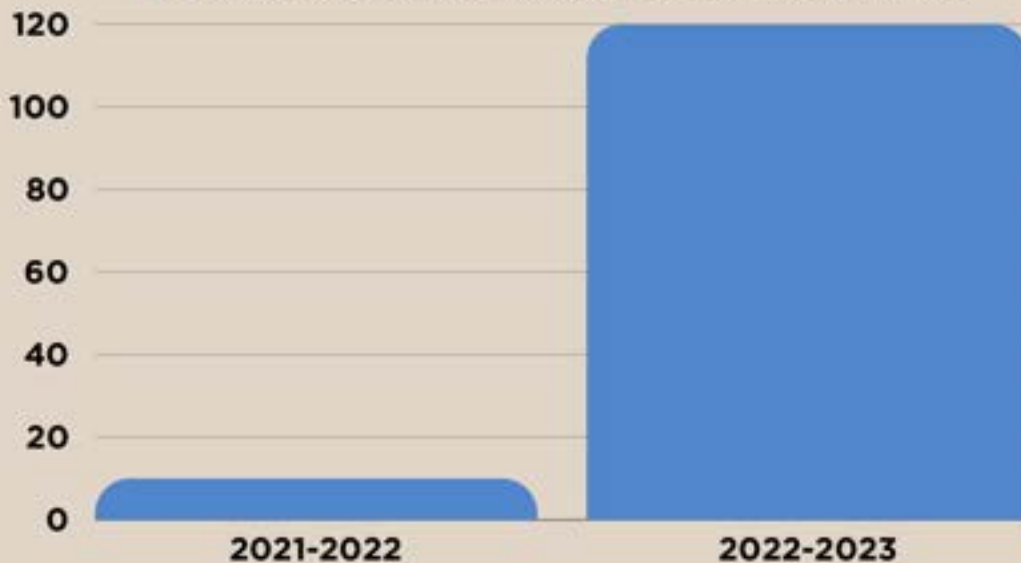
Negative school behavior

decreased by 50%

Highest Math Scores
in the District

Higher than District Average

■ Number of Families Attending Engagement Night



VITA



VOLUNTEER INCOME TAX ASSISTANCE

Creating opportunities through financial stability is a pillar of the United Way of St. Lucie & Okeechobee. This empowers hardworking families with the tools, training, and opportunities to prosper.



The IRS's Volunteer Income Tax Assistance (VITA) program offers free basic tax return preparation to qualified individuals. VITA sites offer free tax help to:

- People who generally make \$58,000 or less
- Persons with disabilities; and
- Limited English- speaking taxpayers

While the IRS manages the VITA program, the sites are operated by IRS partners such as the United Way and staffed by IRS- certified volunteers. VITA services are not only free, but a reliable and trusted source for preparing for tax returns.

Site	Contact	Hours	Open/Close
South Coast Center 1000 S. Highway 1 Fort Pierce, FL 34946	334	Monday, Tuesday, Wednesday, April 14-18, 2024	Monday 9 AM - Friday 12 PM
Fort Pierce Senior Center 2000 S. Highway 1 Fort Pierce, FL 34946	334	Monday, April 15, 2024	Monday 9 AM - Friday 12 PM
Lake Wales Senior Center 1000 S. Highway 1 Lake Wales, FL 33853	334	Monday, April 15, 2024	Monday 9 AM - Friday 12 PM

FACTS

- 3 locations open for 82 days of service
- 897 federally accepted tax returns completed
- \$1.3 million in tax refunds returned to the community

ACHIEVEMENTS & AWARDS



Platinum
Transparency
2023

Candid.



YOUTH UNITED





**UNITED WAY OF
ST. LUCIE & OKEECHOBEE**
4800 S. U.S. HIGHWAY 1, FORT PIERCE FL 34982
772-464-5300



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St. Lucie & Okeechobee**

**United
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