

United Way

2023-2024

Annual Report



UNITED IS THE WAY™



On October 16, 1887, a Denver woman, a priest, two ministers, and a rabbi came together because they believed there was a better way to meet the needs of local residents. More than 135 years later, we still believe that while it only takes one person to spark a world-changing idea, it takes many to actively change the world.

**GIVE BACK.
GET INVOLVED.
TAKE ACTION.**



#UnitedIsTheWay

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A MESSAGE FROM OUR LEADERSHIP

To Our United Way Community,

As President & CEO of United Way St. Lucie & Okeechobee, I am honored to share the impact we have made together during the 2023-2024 fiscal year. Our organization is steadfast in its commitment to ensuring all our neighbors thrive, and we are proud to be a beacon of hope in times of both everyday challenges and natural disasters.

Our dedicated team and partners have worked tirelessly to address critical needs in our community through initiatives focused on Youth Opportunity, Healthy Community, Financial Security, Basic Needs, and Community Resiliency. From supporting educational programs that empower our youth to providing access to healthcare and financial stability resources, United Way is a catalyst for positive change.

This year, we embarked on an exciting journey with the launch of the United Way global brand refresh. This is not merely a visual transformation, but a renewed dedication to our core mission of creating lasting impact. We are proud to be part of a global movement that unites communities and empowers individuals.

We extend our heartfelt gratitude to our generous donors and supporters whose unwavering commitment fuels our work. Your contributions have enabled us to make a tangible difference in the lives of countless individuals and families.

United Way St. Lucie & Okeechobee has been recognized for its financial transparency and accountability with a Candid GuideStar Platinum rating and a 4-Star rating from Charity Navigator. These distinctions are a testament to our dedication to responsible stewardship of your support.

As we look to the future, we remain committed to building a brighter tomorrow for our community. Together, we can overcome challenges, celebrate victories, and create a world where everyone has the opportunity to reach their full potential.



Thomas Epsky
President & CEO
United Way St. Lucie & Okeechobee

Dear Friends of United Way St. Lucie & Okeechobee,

As we reflect on fiscal year 2023-2024, I am filled with gratitude for the resilience, dedication, and collaboration that have defined United Way St. Lucie & Okeechobee this year. It has been a time of transformation and growth, as we have adapted to meet the evolving needs of our community while staying true to our mission of creating lasting, positive change.

On behalf of the Board of Directors, I am honored to share this annual overview of our work. Our commitment to supporting ALICE (Asset Limited, Income Constrained, Employed) families has been a cornerstone of our efforts. These hardworking individuals and families face unique challenges in meeting their basic needs, and we remain steadfast in our focus on providing essential resources in education, healthcare, and financial stability to help them thrive.

This year, we've not only strengthened existing programs but also embraced new leadership, allowing us to better respond to the shifting needs of our community. Our partnerships with local organizations, volunteers, and donors have been essential in driving the impactful work we do. We've focused on creating opportunities for individuals and families to build brighter futures, while ensuring that every dollar invested is used with the highest level of accountability and transparency.

As we look ahead, we know that the landscape of philanthropy is changing, but our commitment to adapting and leading with purpose remains unwavering. The Board of Directors will continue to provide strong oversight and guidance, ensuring that we remain a trusted partner in the work of building stronger, more resilient communities in St. Lucie and Okeechobee.

Thank you for your continued support of United Way St. Lucie & Okeechobee. Together, we are making a lasting impact, and I look forward to what will be accomplished in the year ahead.



Shelly Thomas
2023-2024 Board Chair
United Way St. Lucie & Okeechobee



\$2,282,137

**TOTAL IMPACT
FOR 2023/2024**

THIS YEAR WE PUT...



\$97,031
in Education



\$124,000
in Health



\$186,800
in Basic Needs



\$95,687
in Financial Stability



\$782,890
in Community Services



\$995,729
in United Way Efforts

EXPENDITURES

Administration,
Fundraising &
Marketing
15.25%



Funding to
Community
and
Community
Services*
84.75%



MEET OUR CURRENT TEAM FOR 2024

STAFF

Follow us 

- Thomas Epsky**, President & CEO
- Esperanza Morales**, Chief Financial & Operating Officer
- Tatum Kelley**, Director of Development
- Jeff Howard**, Director of Collaborative Impact
- Dolores Jensen**, Family & Community Engagement Coordinator
- Jason Meyer**, Expanded Learning Coordinator
- Morgan Balsley**, Marketing, Communications & Connections Manager
- Yolanda Rosario**, Campaign & Finance Assistant 

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BOARD OF DIRECTORS

Aneisha Graydon, Florida Power & light

April King, Coca-Cola Beverages Florida

Bob Bysse, Harbour Ridge

Elijah Wooten, Jr, City of Port St. Lucie

Genelle Yost, Community Leader

Jack Nash, Okeechobee County Sheriff's Office

Jeff Emmeluth, Craig, Jeffries Wealth Management

Jennifer Lafferty, SouthState Bank

Joyania Hawthorne, St. Lucie County Board of Commissioners

Kevin Perry, Ph.D. St. Lucie County Public Schools

Lori Matich, Cleveland Clinic Tradition

Marcos Valladares, Johnson Controls

Mindy Howes, Nuttall, Donini & Associates

Rhonda Wigglesworth, St. Lucie County Sheriff's Office

Shelly Thomas, St. Lucie County Property Appraiser

Tenna Wiles, Community Leader

Vanessa Farnes, Seacoast Bank

Mission Statement

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

Vision Statement

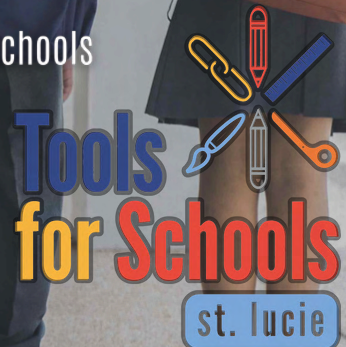
United Way of St. Lucie & Okeechobee will be the catalyst to achieve a sustainable community in the areas of health, education, and financial independence



OUR PROGRAMS

In 2023-2024, we distributed **\$201,324** worth of supplies to **1,806** teachers in **33** schools

Tools for Schools is a program that provides free school supplies to schools in St. Lucie County where more than 70% of students qualify for the free or reduced lunch program, helping ensure all children have the tools they need for academic success.



Volunteer Income Tax Assistance

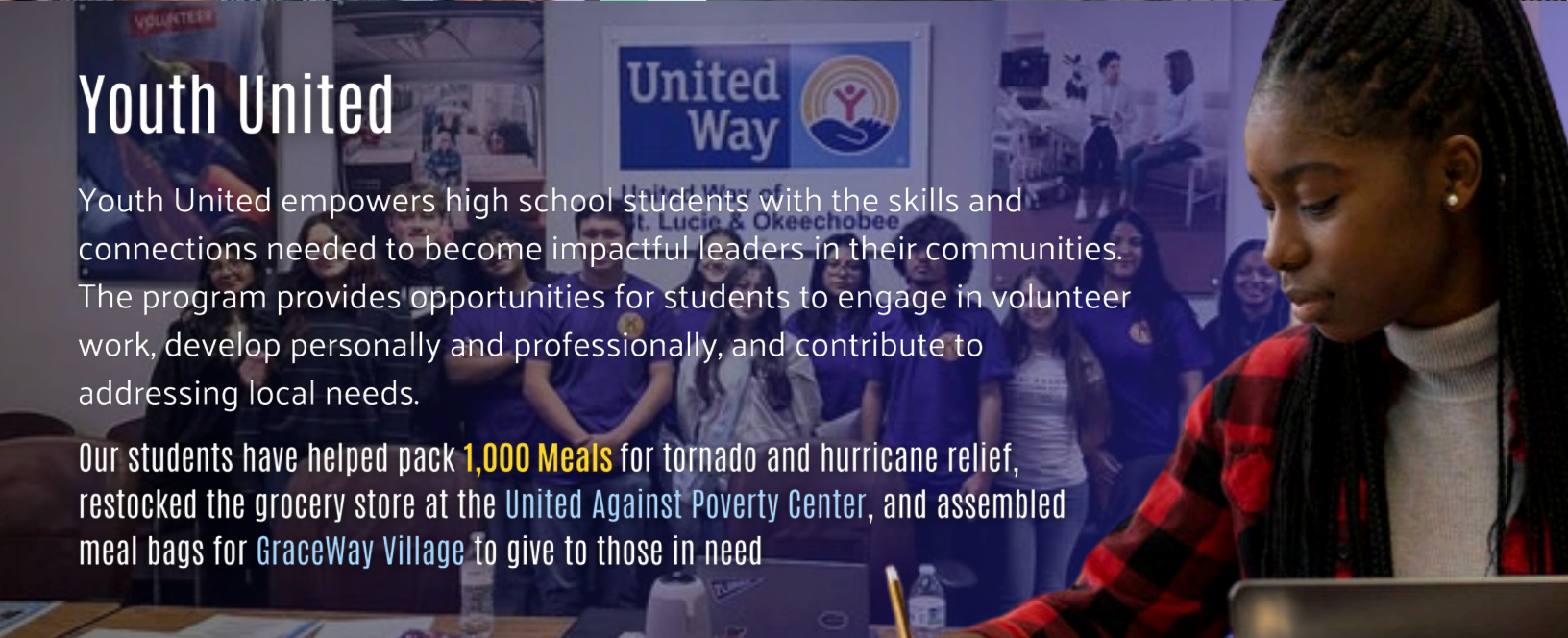
Our Volunteer Income Tax Assistance (VITA) program helps support local families with free tax preparation services—making tax season easier and more affordable.

We helped secure a **total refund amount of \$882,809** in 2023-2024 with **735** accepted returns

Youth United

Youth United empowers high school students with the skills and connections needed to become impactful leaders in their communities. The program provides opportunities for students to engage in volunteer work, develop personally and professionally, and contribute to addressing local needs.

Our students have helped pack **1,000 Meals** for tornado and hurricane relief, restocked the grocery store at the United Against Poverty Center, and assembled meal bags for GraceWay Village to give to those in need





FUNDED PARTNERS

United Way of St. Lucie & Okeechobee directs the majority of its incoming revenue to our funded partners so that we can continue our mission to improve lives by mobilizing the caring power of our community. Our efforts focus on addressing key areas such as basic needs, financial stability, health, and education, ensuring that resources are channeled to where they are most needed to make a meaningful impact.

2023-2024 Funded Partners

BASIC NEEDS

211 of the Treasure Coast

211 Helpline

Council On Aging St. Lucie

National Family Caregiver Support

GraceWay Village

Café

LifeBuilder's of the TC Inc.

Lifebuilders of the TC

Martha's House

Special Shelter Program for Male Victims

Mustard Seed Ministries

Mustard Seed Ministries

Sarah's Kitchen

Okeechobee Healthy Start Coalition

Emergency Client Needs

Real Life Children's Ranch

Professional House Parents

The Salvation Army

Basic Needs

United Against Poverty

Crisis Stabilization

2023-2024 Funded Partners

EDUCATION

Big Brothers Big Sisters

Launching into Literacy

Early Learning Coalition of Indian River, Martin, and Okeechobee (IRMO)

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 and Prevention Day Program

Roundtable of St. Lucie/ Cayuga Centers

IGNITE Youth Alliance

2023-2024 Funded Partners

FINANCIAL STABILITY

Helping People Succeed

Successful Futures

Mustard Seed Ministries

Planning Your New Future

The ARC of the Treasure Coast

Adult Day Program

United Against Poverty

STEP

2023-2024 Funded Partners

HEALTH

Alzheimer's Community Care Inc.

Specialized Alzheimer's Daycare

Healthy Start Coalition of St. Lucie

Newborn Home Visitation

Helping People Succeed

Behavioral Health Services

The Inner Truth Project

S.H.I.P. Services

Florida Department of Health

Sunny Smiles

Light of the World Charities, Inc.

Little Lights Dentistry

Our Community Partnership School

program at  White City
Elementary



This is Hoppy.



He is the happiest rabbit in the whole world. He loves to hop all day long and never gets tired!

He lives with his mummy Mrs. Hop A lot. He does not have any brother or sisters so sometimes Hoppy gets lonely.



Contributed to Bringing the School from a D to a B Ranking

2nd Lowest Behavioral Issues in District

Distributed 3000 Books

Put Shoes on 150 Pairs of Feet

1st School in District to Host TCFB School Market Program Event

Our Community Partnership School at White City Elementary is a resource hub designed to improve student outcomes by providing essential support to students, families, and the broader community. By focusing on academics, health, social services, and community engagement, we offer a range of services, including basic needs support, access to healthcare, academic enrichment, and mental health services.



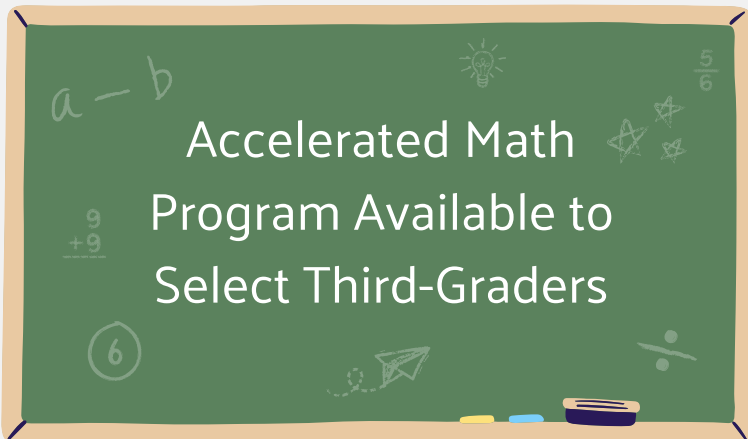
Parent Participation

increased by 60%

Focus Areas

- Family Engagement Nights
- All Pro Dad
- Men in Training
- Sustainable Garden
- Teacher Appreciation
- Reading Nights
- Community Involvement
- Resources for Families

100% of students report feeling safe at school



Family Engagement
25%

Educational Help
25%

Mental Health & Wellness
25%

Basic Needs
25%

TOP 10 MOST GENEROUS WORKPLACES

1. Publix Supermarket Charities, Inc
2. Bernard A. Egan Foundation
3. Florida Power & Light/Nextera Foundation
4. Seacoast Bank
5. Bank of America
6. School Board of St. Lucie County
7. Fort Pierce Utilities Authority - FPUA
8. Silver-Line Plastics
9. Enterprise Holdings Foundation
10. St. Lucie County Fire District

By highlighting the top 10 most charitable employers, where employees actively contribute to the United Way of St. Lucie & Okeechobee, we emphasize the collective commitment to driving positive change in our community. We express our sincere gratitude to all those making a difference through their contributions. Our deepest appreciation goes to these workplaces for their steadfast support and dedication to enhancing the lives of individuals in St. Lucie and Okeechobee counties.





TOCQUEVILLE
SOCIETY



\$424,838

The Alexis de Tocqueville Society offers passionate individuals an opportunity to deepen their commitment to our mission. As the highest distinction within United Way, members of the Society invest \$10,000 or more annually. This year, the 13 members of the Alexis de Tocqueville Society in St. Lucie & Okeechobee counties collectively contributed over \$424,838 to support our local efforts.



HARBOUR RIDGE
YACHT & COUNTRY CLUB



2023-2024

Top Philanthropic Gated Community

Financials

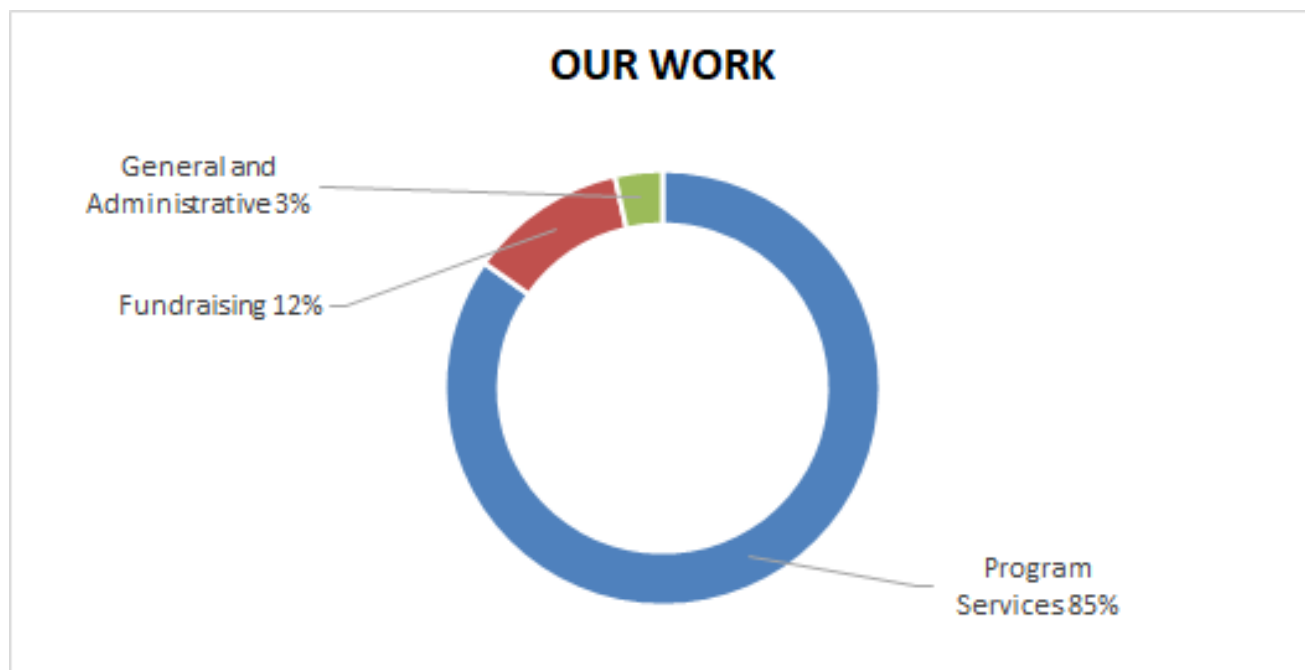
Income

Public Support and Revenues	\$1,611,291
Less: Amounts raised on behalf of others (designated gifts)	(144,578)
Less: Provision for uncollectible pledges	(113,464)
	<hr/>
	\$1,353,249

Expenses

Program Services	\$1,282,419
Fundraising	177,365
General and Administrative	53,476
	<hr/>
Total Expenses	\$1,513,260

Change in Net Assets	(160,011)
Net Assets - July 1, 2023	3,069,793
Net Assets - June 30, 2024	\$2,909,782



Awards & Achievements



Day of Caring



Day of Caring is an annual community-wide initiative that unites volunteers and local businesses to offer short-term, project-based volunteer services to nonprofit and public organizations. This effort provides participants with the opportunity to experience the intrinsic rewards of positively impacting the well-being of our region.

STAY IN TOUCH



company/uwslo



unitedwaystlucieokee



uwstlucieokee

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THANK YOU

For Investing in
Your Community

GET INVOLVED. GIVE BACK. TAKE ACTION.

www.uwslo.org

