

United Way 2024-2025 Annual Report



UNITED WAY
St. Lucie &
Okeechobee



UNITED IS THE WAYTM



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

A photograph of three men standing behind a table outdoors, surrounded by various fresh fruits and vegetables. The man on the left is wearing a blue t-shirt, the man in the middle is wearing a yellow t-shirt, and the man on the right is wearing a dark blue jacket. They are all looking down at the food on the table. The table is covered with a yellow cloth and has a cardboard box labeled 'BREAD' in the background. The background shows trees and a grassy area.

CONTENTS

4	A Message from Our CEO
5	A Message from Our Board Chair
6	Our Impact This Year
7	Meet Our Team
8	Mission & Vision
9	Board of Directors
10	Our Programs
11	Tools for School
12	VITA
13	Youth United
14	Community Partnership Schools
15	White City Elementary
16	Weatherbee Elementary
17	Weatherbee Elementary
18	Funded Partners
19	Funded Partners
20	Ride United
21	Mission United
22	Mission United
23	Workplace
24	Tocqueville Society
25	Harbour Ridge
26	Financials
27	Financials
28	Awards & Achievements
29	Volunteers
30	Stay in Touch

A MESSAGE FROM OUR LEADERSHIP

To Our Valued United Way Community:

It is with immense pride and deep gratitude that I share the highlights of the 2024-2025 fiscal year. As President & CEO of United Way St. Lucie & Okeechobee, I am continually inspired by the shared commitment that drives our mission: to ensure every neighbor in our region could thrive. Our vision for a healthier, stronger, and more resilient community is becoming a reality because of you.

This year was marked by impactful growth and renewed energy, all made possible by your generosity and partnership. Thanks to your unwavering support, United Way St. Lucie & Okeechobee invested an impressive \$2.8 million directly into vital programs and services across St. Lucie and Okeechobee Counties. You helped us achieve this significant investment impact, focusing on Youth Opportunity, Financial Security, and Community Resiliency.

We are not only proud of the results we achieve but also of how we achieve them. I would like to sincerely thank our dedicated Board of Directors, our tireless volunteers, and our passionate staff for their tireless service. Their commitment is the driving force behind our success. I am especially proud to share that our organization was honored as a Best Place to Work Employer this year, recognizing the culture of service and dedication within our team.

We also remain steadfast in our commitment to financial excellence and transparency. Your contributions are managed with the highest level of accountability, which is why we are proud to maintain the Charity Navigator Four-Star Rating and the Candid Platinum Seal of Transparency. Furthermore, we were honored to be selected in the Best of Nonprofit category at the 39th Annual Business & Industry Awards, sponsored by the St. Lucie Chamber of Commerce—a true testament to the faith our community places in us.

Finally, we were excited to roll out the United Way Global Brand Refresh this year. This transformation is more than just a new look; it's a revitalized commitment to leading with purpose, uniting our community around common goals, and demonstrating that United is the Way to create lasting change.

Thank you for trusting us as your partner in philanthropy. We are forward-looking and energized for the future, knowing that together, we can overcome any challenge and build a brighter tomorrow for every family we serve.

With Sincere Appreciation,
Thom Epsky
President & CEO



A MESSAGE FROM OUR LEADERSHIP

Dear Friends of United Way St. Lucie & Okeechobee,

As the Chair of your Board of Directors, I am honored to share this annual report reflecting on the significant work accomplished during the fiscal year July 1, 2024, to June 30, 2025. This past year tested the resilience of our community, but it also showcased the extraordinary power of collective action.

Our mission to create lasting, positive change took on new urgency following Hurricane Milton. Our immediate focus shifted to assisting affected residents with their recovery, and I am incredibly proud of how our team, volunteers, and partners stepped up. This experience reinforced the necessity of preparedness, leading us to officially join the St. Lucie Disaster Recovery Coalition and successfully secure crucial disaster preparedness grants. We are committed to ensuring our community is ready to weather any natural disaster.

Beyond disaster recovery, we've made major strides in expanding our core services. We proudly launched Mission United, a vital initiative dedicated to assisting our local veterans and their families by connecting them to essential health and social services. Our commitment to youth success deepened with the expansion of our Community Partnership School program to include Weatherbee Elementary, the continued impact of Tools for Schools, which provides free classroom supplies, and the growth of Youth United, which introduces high school students to philanthropy and the crucial work of our funded partners.

Innovation in meeting basic needs was also a priority. Thanks to a generous grant from the Cleveland Clinic, we were able to launch Ride United, addressing transportation barriers by helping residents access critical appointments and employment opportunities. Throughout all these efforts, enhancing our community partnerships and collaborations has been paramount, as we know that United is the Way to achieve large-scale impact.

On behalf of the Board, we would like to thank every volunteer, donor, partner, and staff member. Your support ensures that we remain a reliable, efficient, and transparent steward of resources dedicated to improving the lives of ALICE families and all residents in St. Lucie and Okeechobee. We look forward to another year of building a stronger, more resilient community together.

Sincerely,

Lori Matich, MSN RN NE-BC · Senior Director of Nursing
Cleveland Clinic Tradition Hospital & SLW Emergency Department





\$3,040,217

TOTAL IMPACT
FOR 2024/2025

THIS YEAR WE PUT...



\$665,380

in Youth Opportunity



\$124,000

in Health Community



\$185,050

in Community Resiliency



\$95,687

in Financial Security



\$566,559

in Community Services



\$1,403,541

in United Way Efforts

EXPENDITURES

Administration,
Fundraising &
Marketing
10.59%



Funding to
Community
and
Community
Services*
89.41%

STAFF

Thomas Epsky, President & CEO

Esperanza Morales, Chief Financial & Operating Officer

Tatum Kelley, Vice President of Development

Jeff Howard, Director of Collaborative Impact

Jenna Norvell, Senior Officer of Strategic Partnerships

Susanne Patterson, Finance Manager

Joe Snowberger, Mission United Director

Community Partnership Schools

Jennifer Tirado, Director of Community Partnership School - White City Elementary

LaWanda Thornton, Wellness Coordinator - White City Elementary

Ryan McNeil, Expanded Learning Coordinator - White City Elementary

Rashaun Bennett, Family and Community Engagement Coordinator - White City Elementary

Mat Churchey, Director of Community Partnership School - Weatherbee Elementary

Adina Topfer, Family and Community Engagement Coordinator - Weatherbee Elementary

Stephen Kitchen, Expanded Learning Coordinator - Weatherbee Elementary School

St. Lucie Disaster Relief Coalition Initiative

Eric Blomquist, St. Lucie Disaster Recovery Coalition Director

GeanPaul Ojeda, St. Lucie Disaster Recovery Coalition Case Management Coordinator

Jax Fromer, St. Lucie Disaster Recovery Coalition Community Engagement Specialist

2025

Follow us 

www.uwslo.org

(772) 464-5300



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

BOARD OF DIRECTORS

Aneisha Graydon, Florida Power & light

Anita Fischer, St. Lucie Economic Development Council

April King, Coca-Cola Beverages Florida

Austin Alderman, Dean Mead

Camille Wallace, Esquire, City of Fort Pierce

Genelle Yost, Community Leader

Jeff Emmeluth, Craig, Jeffries Wealth Management

Joyania Hawthorne, St. Lucie County Board of Commissioners

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

Kimberly Clarizio, Clarizio, CPA

Lori Matich, Cleveland Clinic Tradition

Marcos Valladares, Johnson Controls

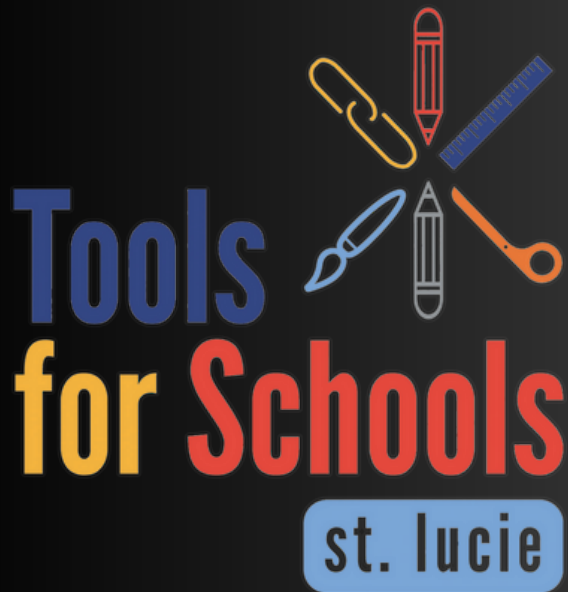
Peter Webb, Supervisor Tradition Community Development, District 6

Shelly Thomas, St. Lucie County Property Appraiser

Vanessa Farnes, Seacoast Bank



OUR PROGRAMS



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.



- Each teacher receives an average of **\$140** worth of supplies each visit!



UNITED WAY
St. Lucie &
Okeechobee

UNITED WE *thrive!* With Your Support

Tools for Schools St. Lucie is a **year-round** initiative that supports public school teachers and students by providing donated school supplies at no cost.

589 Teachers Served

\$82,919 worth of supplies

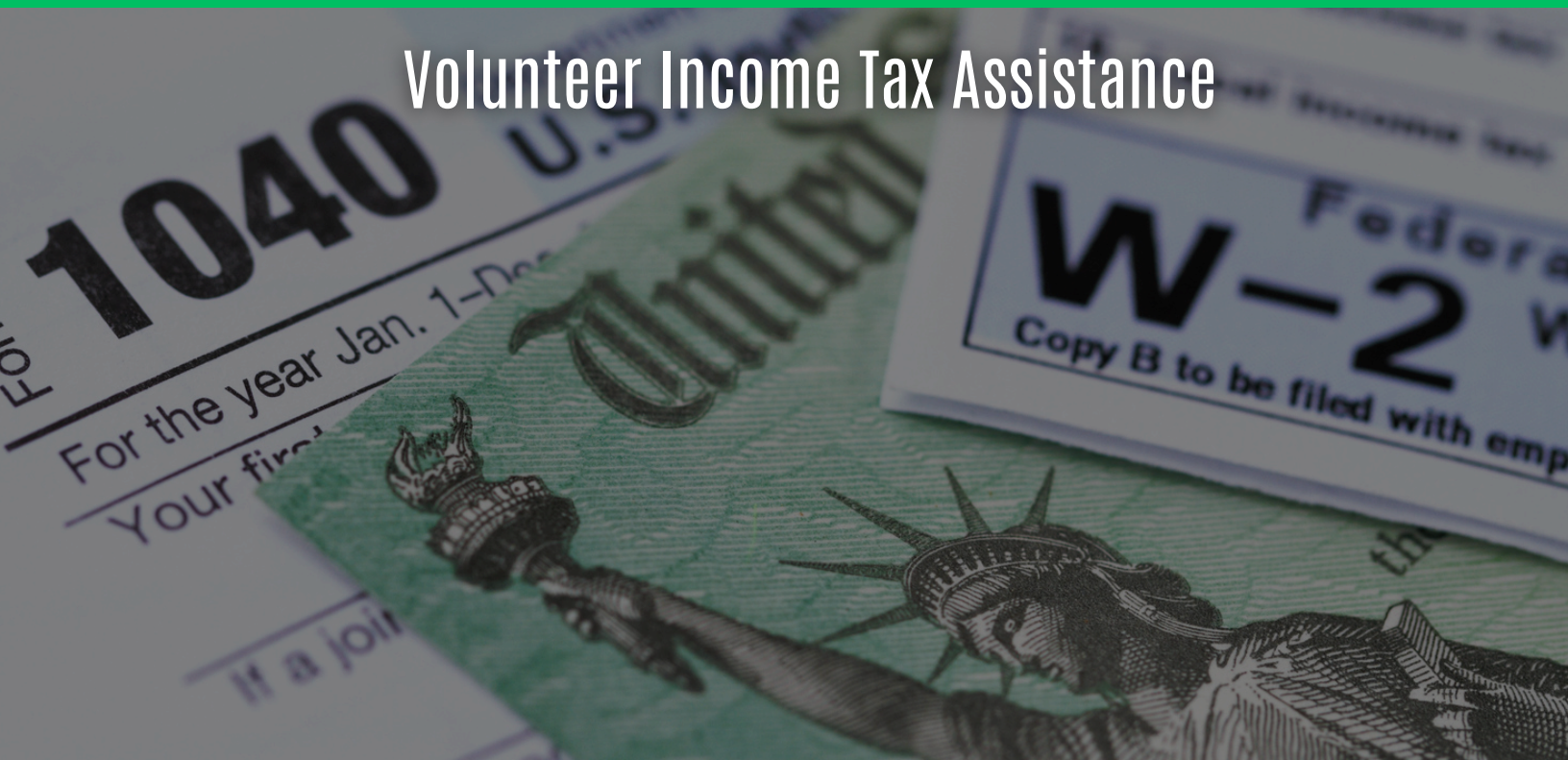
3000 Students Benefited



We believe that every student should have access to the tools they need to succeed, regardless of family income.

VITA

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 **\$830,817** in 2024-2025 with **704 accepted returns**



YOUTH UNITED



Youth United is a United Way initiative that engages high school students in leadership development, volunteerism, and community service. The program empowers young people to identify local needs, work collaboratively on solutions, and develop skills that prepare them to be active, compassionate leaders in their communities.

This past year, Youth United at United Way of St. Lucie & Okeechobee continued to inspire and equip young leaders through service projects, leadership training, and civic engagement opportunities. By connecting students with community partners and real-world challenges, the program fostered empathy, teamwork, and a strong sense of responsibility. Youth United is helping shape a generation of changemakers committed to strengthening our local community.

IMPACT

- Our students have served a combined total of **285 hours**
- Served a total of **10 Community Service Partners** Poverty Center

Community Partnership Schools

IN COLLABORATION WITH



**Center for
Community Schools**

UNIVERSITY OF CENTRAL FLORIDA



**White City
Elementary**



**WEATHERBEE
ELEMENTARY**



VISION & MISSION

IN COLLABORATION WITH



**Center for
Community Schools**

UNIVERSITY OF CENTRAL FLORIDA



**White City
Elementary**

White City Elementary (WCE), a Community Partnership School, focuses on creating a supportive environment, enhancing student learning, strengthening families and building healthier communities through a holistic approach to ensure students thrive.

Utilizing relationships between the school, the core partners, and other community resources, Community Partnership Schools address and eliminate barriers to support collective leadership, expanded learning, wellness and family and community engagement.

CORE PARTNERS



**INDIAN RIVER
STATE COLLEGE**

**St. Lucie
PUBLIC SCHOOLS**



**ST. LUCIE COUNTY
Children's
SERVICES COUNCIL**

**Southeast Florida
BEHAVIORAL HEALTH NETWORK**

**Cleveland
Clinic**



**Building
a healthy
community
together.**

OUR IMPACT

992 combined total
hours of volunteerism

10 mentors with 53
total hours of
mentorship

Students received:
13 Primary Health
referrals
17 Behavioral Health
referrals,
1 Vision referral and
275 Dental Health
visits on site

30 Students received
Academic Support &
Enrichment through our
CSC ROAR program.

81 Total Students were
supported with Tutoring
19 of those with Big
Brothers, Big Sisters
READS

515 Families
participated in 18
Family/School
Engagement Events

387 Families received
food resources

From the HUB, 339
Students received

- 239 clothing items
- 92 pairs of shoes
- 167 school supplies

More than 1208 Books
given to students!



OUR SCHOOL

- 504 Students
- 49.8% Female & 50.2% Male
- 83.9% Economically disadvantaged
- 31.2% English Language Learners
- 8.9% Students with Disabilities

468 points= B
rated School!



NEW SITE: PLANNING YEAR



SLPS SY26 Fall 2025 Family Climate Survey Results by School - % Average Rating by Question		Randomized School Number	# of Participants	1. The adults at my student's school make us feel welcomed.	2. The adults at my student's school care about my success.	3. The adults at my student's school think about children's safety when making decisions.	4. The adults at my student's school help children believe they can accomplish tasks.	5. The adults at my student's school are committed to improving the school's well-being.	6. The adults at my student's school care about children's well-being.	7. The adults at my student's school provide the resources children need for learning.	8. The adults at my student's school share information to help students learn.	9. The adults at my student's school have high expectations for learning.	10. The adults at my student's school know about their work well.	Overall Family Average
All SLPS Responses				90%	92%	92%	91%	90%	90%	89%	91%	89%	90%	
Weatherbee Elementary School		28	86	94%	96%	93%	93%	95%	95%	93%	95%	96%	96%	93%



SCHOOL STATS

Enrollment Demographics 693

- RACE: BLACK 238, HISPANIC 330, WHITE 90, MULTIRACIAL 34, ASIAN 1
- ENGLISH LANGUAGE LEARNERS: 259
- ESE: 96
- HOMELESS 115
- FREE REDUCED LUNCH: 536
- MIGRANT: 42

School Climate Survey Information: See above for chart

- 94% of parents believe they are treated with respect by the school
- 96% of parents believe the adults at the school care about the students well-being.
- 95% of parents believe the adults at the school are committed to improving the school.
- 95% of students believe adults at the school make decisions to keep us safe.
- 90% of students believe that there is an adult who will help me if they need it.
- 93% of teachers believe the school is responsive to concerns and input.
- 99% of teachers feel supported by their principal to provide quality instruction for their students.

Program & Activity Information

- BIG BROTHERS / BIG SISTERS:
- NEW HORIZINS:
- TYKES & TEENS:
- FIRST TEE GOLF:
- MENTORING:
- TUTORING:
- ALL PRO DAD
- CHILD PARTICIPATION
- READING
- READS PROGRAM
- PREVENTIONS PROGRAMING
- MENTAL HEALTH COUNSELING
- SPORTSMANSHIP, GOLF FUNDAMENTALS, ETIQUETTE
- CONFIDENCE & SOCIAL SKILLS
- MATH, READING & VOCABULARY, WRITING
- RELATIONSHIP BUILDING, COMMUNICATION. FATHER &
- 5th GRADE BOOK CLUB

IN COLLABORATION WITH



**Center for
Community Schools**

UNIVERSITY OF CENTRAL FLORIDA



**WEATHERBEE
ELEMENTARY**

School Goals :

- INCREASE STUDENT DAILY ATTENDANCE TO **95% +**
- INCREASE SCHOOL WIDE PROFICIENCY IN ELA AND MATH TO ATLEAST **50%**
- MAINTAIN POSITIVE SCHOOL CLIMATE SURVEY FOR STUDENTS AND STAFF
- UTILIZE PBIS TO FULL EXTENT
- INCREASE ENGLISH LANGUAGE LEARNERS AND STUDENTS WITH DISABILITIES STATE PERFORMANCE **+41%**



Other Service Provisions:

- GIVEN **150** PAIRS OF SHOES THROUGH COLLABORATION WITH LITTLE FEET FOUNDATION
- SERVED MORE THAN **400** INDIVIDUALS VIA FOOD OUTREACH THROUGH COLLABORATION WITH TREASURECOAST FOOD BANK
- GIVEN MORE THAN **1000** ARTICLES OF CLOTHING
- GIVEN **500** STUDENTS SCHOOL SUPPLIES
- SUPPORT FOR SCHOOL INITIATIVES: PBIS FOR STUDENTS, STAFF APPRECIATION, READING & SCIENCE



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.

2024-2025 Funded Partners

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

Mustard Seed Ministries
Direct Services

COMMUNITY RESILIENCY

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

YOUTH OPPORTUNITY

Education Foundation of Okeechobee
Scholarship Programs

Early Learning Coalition of St. Lucie County
School Readiness for ALICE Families

HEALTH COMMUNITY

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

FINANCIAL SECURITY

Helping People Succeed
Successful Futures

Mustard Seed Ministries
Planning Your New Future

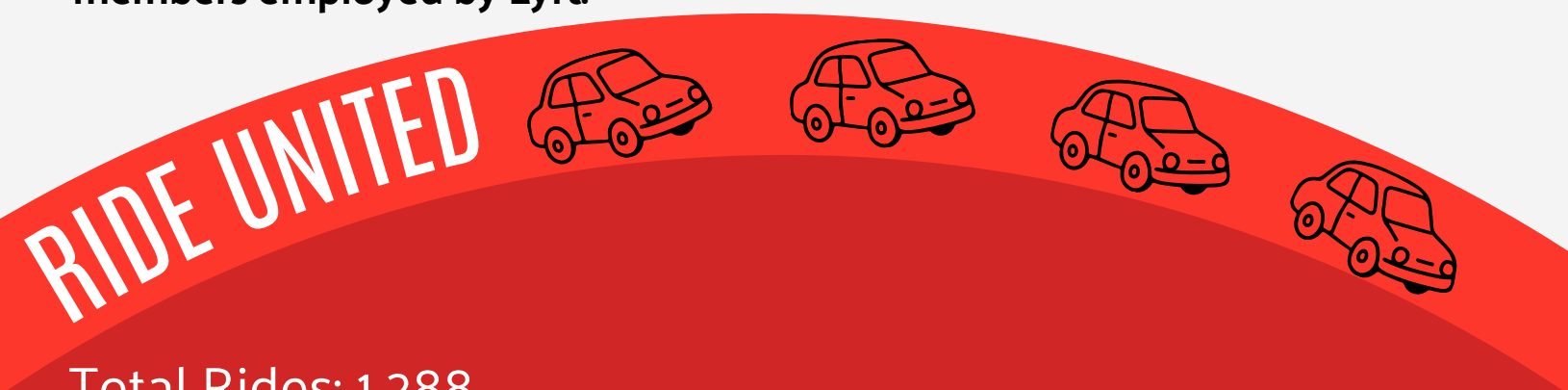
The ARC of the Treasure Coast
Adult Day Program

United Against Poverty
STEP



The Ride United program, a collaboration between United Way and Lyft, is here to help those in our community who are struggling with transportation barriers. We understand that for many, getting to essential services like healthcare, employment, or the grocery store can be a challenge. That's why Ride United is helping provide free or reduced Lyft rides to St. Lucie County residents who need it most, helping them get to medical appointments, job interviews, work, and other critical destinations.

Drivers are not employed through United Way; they are local community members employed by Lyft.



Total Rides: 1,288

Transportation Top Needs:

- 32% for Health related purposes (Doctor appt., Pharmacy, Mental Health services)
- 30% for Employment related purposes (commute to work, interview, etc)
- 4% for Food (Grocery store, Food Pantry, Meal sites)



Okeechobee | St. Lucie

Mission United, a United Way veteran initiative, powered by Our Village Okeechobee. This program helps military veterans and their families navigate the often complex network of benefits and services needed to overcome barriers and achieve long-term stability.

More than 45,000 veterans and their families live in St. Lucie and Okeechobee counties, many facing challenges related to healthcare, employment, housing, and access to earned benefits. Mission United addresses these gaps through veteran peer care coordinators who guide veterans and their families in identifying needs and connecting to critical resources.

By providing PERSONALIZED, PEER-DRIVEN support, Mission United helps veterans and their families move toward stability, independence, and a better quality of life.

Proudly serving those who have served.



UNITED WAY
St. Lucie &
Okeechobee



The SITREP

Vol 1 Issue 2 Fall 2025



Okeechobee | St. Lucie

BY THE NUMBERS

In the first five months since the soft launch in August 2025, **MISSION UNITED Okeechobee & St. Lucie's** Veteran-peer staffer and volunteer directly assisted **27** Veterans and families address barriers to living self-sustaining and stable lives. Other key numbers:

- Provided **111** referrals and direct connections to **37** human, social and Veteran resources and services.
- Veterans Administration (VA) social workers and Veteran Service Officers referred **17** Veterans to MISSION UNITED for assistance and support.
- **12** vulnerable or disabled Veterans received free transportation for essential appointments through RIDE UNITED.
- **\$7,200** was raised locally over 3 months to prevent a Veteran's homelessness and support basic needs while unemployed over an extended period.

MISSION UNITED collaborated with agencies and the VA, fostering positive outcomes in these situations:

- Coordinated the rescue and re-housing for a homeless elderly Veteran.
- Prevented eviction, homelessness for a Veteran during his four-month job search.
- Provided intense, hands-on case management and developed a basic needs support system for three Veterans, all existing in austere conditions.
- Reconnected a vulnerable Veteran, in crisis, to VA mental health services and employment support.

Each Veteran facing challenges brings a distinct background and circumstances. Some require ongoing, comprehensive assistance to meet basic needs and regain stability, while others benefit from the presence of a Veteran-peer who can listen attentively and help guide them through complex service systems to overcome barriers and achieve lasting stability.

NEED A LYFT? RIDE UNITED!

The **RIDE UNITED** program, a partnership between Lyft and United Way, offers free or discounted Lyft rides to Veterans in Okeechobee & St. Lucie County who face transportation barriers impacting their sustainability.

This service helps them access medical appointments, job interviews, work, and essential services.

Since the November launch, **12** Veterans have received RIDE UNITED support for crucial treatments and services not supported by the VA transportation system.

Contact us for more information, eligibility or to schedule a lift from Lyft.

Are you a Veteran Needing Help?

Can You Help Us Help Veterans?

772.782.1939

MISSIONUNITED@MUOSL.Org

www.uwslo.org/mission-united

Offices:

Our Village Okeechobee
205 NE 2nd St.
Okeechobee, FL 34974

United Way of St. Lucie &
Okeechobee
4800 S. US Hwy 1
Fort Pierce, FL 34982



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



\$433,453

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 \$433,453 to support our local efforts.



HARBOUR RIDGE
YACHT & COUNTRY CLUB



2024-2025

Top Philanthropic Gated Community

Financials

Based upon United audit figures from the fiscal year ending June 30, 2025.

ASSETS	2024-2025
Cash and Cash	\$495,966
Investments	\$2,671,926
Accounts/Contributions Receivable	\$238,969
Inventory	\$111,366
Property and Equipment	\$78,983
Interest Receivable	\$6,561
Total Assets	\$3,603,771

LIABILITIES	
Account Payable & Accrued	\$111,081
Designations Payable/Funds Held on behalf of others	\$58,644
Promises to give to member agencies	\$405,587
Total Liabilities	\$575,312

NET ASSETS	
With donor restrictions	\$171,209
Without donor restrictions-board designated Endowment & Initiatives	\$1,905,575
Without donor restrictions	\$951,675
Total Net Assets	\$3,028,459

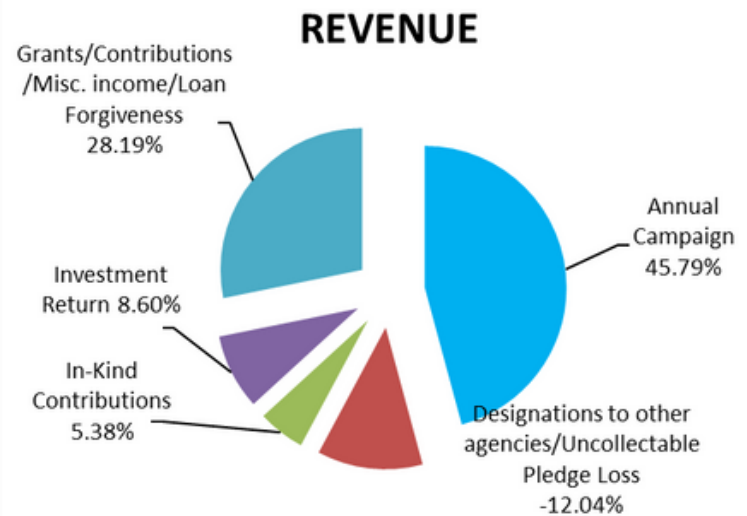
Total Liabilities and Net Assets	\$3,603,771
----------------------------------	-------------

Financials

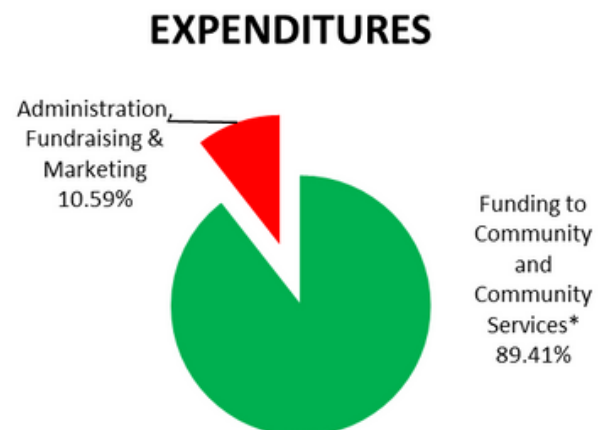
Based upon United audit figures from the fiscal year ending June 30, 2025.

FINANCIAL STEWARDSHIP

REVENUES	2024-2025
Annual Campaign	\$1,132,996
Designations to other agencies/Uncollectable Pledge Loss	(\$297,840)
In-Kind Contributions	\$133,102
Investment Return	\$212,699
Grants/Contributions /Misc.	\$697,448
Total Revenues	\$1,878,405



EXPENDITURES	2024-2025
Funding to Community & Services	\$1,573,366
Admin, Fundraising & Marketing	\$186,362
Total Expenditures	\$1,759,728



Change in Net Assets	\$118,677
----------------------	-----------

Awards & Achievements

Recognized by the St. Lucie Chamber at the
39th Annual Business & Industry Awards

Winner: Best in St. Lucie Non-Profit



Volunteering

United in Action



Volunteers are the driving force behind our impact. This year, hundreds of individuals gave their time and talents to support students, families, and community programs. From creating Born Learning Trails to reading with children at our Community Partnership Schools, volunteers contributed thousands of hours that advanced early learning, literacy, and student success across our community. Their service expanded our reach and proved what's possible when people come together.

United, we can do so much. Be part of the impact. Volunteer today.

#United Is The Way

STAY IN TOUCH



company/uwslo



unitedwaystlucieokee



uwstlucieokee



@UnitedWaySLO



@UnitedWaySLO

info@uwslo.org

(772) 464-5300

4800 S. U.S. Highway 1

Fort Pierce, FL 34982

THANK YOU

For Investing in
Your Community

GET INVOLVED. GIVE BACK. TAKE ACTION.

www.uwslo.org

