

LIVE UNITED™

The Case for Giving



United
Way



United Way of St. Lucie County

The Caring Power of Our Community



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Our Mission

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

Our Vision

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



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Letter

From the CEO

We are creating innovative ways for you to give back to our community!

Dear Friends,

For more than 50 years, the United Way of St. Lucie County has been an integral part this community's growth and wellbeing. Our foundation was humble, with the organization taking root to connect those most in need with those who felt a deep desire to give back to the place they called home. Even after a half-century of serving this community, the goals of this organization remain firmly engrained in that simple principle. It's the core of our mission: to improve lives by mobilizing the caring power of our community.

Time has brought great change to St. Lucie County, but throughout our evolution, one quality has remained constant and true – caring power. The giving nature of our community and the people within it are like none other. You invest your time. You invest your resources. You invest immeasurable amounts of leadership and love. Most importantly, you do it all because your heart has compelled you to make St. Lucie County a better place.

Today, as in years past, we are diligently working with community leaders, business partners, government, nonprofits, faith-based organizations and our community and funded partners to impact as many lives in St. Lucie County as possible. Our assessments show a growing number of homeless families, a limited amount of quality and affordable daycare, many residents not having enough to eat, and individuals and families with limited to no access to healthcare. More of our youth, elderly, and victims of violence and abuse are in desperate need of critical services. We often ask ourselves, what is it that we can do to address this ever expanding need? The answer is easy - more. The United Way of St. Lucie County CAN do more...but we can't do it without you.

Over the next year, United Way of St. Lucie County plans to continue to draw from the caring power of this county as never before. To do so, we're working on innovative ways for you to give back to our community by investing in United Way. One way is to be a part of a unique group of compassionate individuals that recognizes the importance of leave a lasting legacy. By including United Way of St. Lucie County in your will and estate plan, you will join other exceptional individuals providing gifts that will keep on giving beyond your lifetime.

We've created this document to show how we remain steadfastly committed to being good stewards of your gifts, and to detail how you might create a legacy of giving. It is our hope that it may inspire you to do more, so that we may do the same.

Sincerely,



Karen Knapp
CEO United Way of St. Lucie County

Karen Knapp
CEO/President
United Way of St. Lucie County



**United Way
of St. Lucie County**



History



History of the United Way of St. Lucie County

Nov. 1962

The Articles of Incorporation were ratified by State of FL. The name of the organization United Fund of St. Lucie County, Inc.; located in downtown Fort Pierce, FL. with Reid Jensen as Board President and Alto Adams, Jr. as Treasurer.

1963

- United Fund volunteers announce the result of its first campaign - \$67,000

1969

- Exceeded campaign goal for very first time - \$94,000

1984

- Jackie Butts was ED., taking the place of her father Fred Johnston. The campaign totaled \$343,000

1987

- Leadership Giving Society was created - Fredrick T. Johnson Society - exemplifying leadership givers

1993

- First gated community campaign: Harbour Ridge Yacht and Country Club

1997

- United Way began School Supplies for Students Program
- Received first major bequest from George P Stanich, a local car dealer
- Board created an Endowment Fund
- United Way broke the million dollar mark
- United Way received a generous gift from Marti and Wayne Huizenga - \$500,000 over 5 year period

1998

- Articles of Amendment to the Articles of Incorporation were adopted to officially change the name of the organization to United Way of St. Lucie County, Inc.

2001

- United Way funds 2-1-1 Information and Referral Services expand to St. Lucie County
- Charles Brown, hired as ED

2002

- Karen Knapp, hired as President/CEO, \$1.5 million raised

2004

- Two Hurricanes make a direct hit on St. Lucie County - United Way Board allocates \$125,000 in emergency funds

2006

- United Way receives Andrew Kott Trust funds of \$70,000

2007

- United Way completes the first Communitywide Assessment of Social, Health and Public Safety Services in SLC

2008

- United Way's Volunteer St. Lucie was created
- United Way invests seed money to start the Health Access Network Delivery Services (HANDS Clinic) for uninsured and underinsured adults

2010

- United Way adopts three main focus areas Education, Income Stability and Health

2012

- United Way updates Community wide Assessment of Social, Health and Public Safety Services in SLC

2013

- Inaugural Orange Blossom Ball to celebrate United Way of St. Lucie County's 50th Anniversary

2014

- Launch of the ALICE Project focused on the Asset Limited Income Constrained Employed population





**LIVE
UNITED**

PLANNED *Giving*

LIVE UNITED



United Way of St. Lucie County

Our Case for Giving



United Way's Role in Community Well Being

For over 50 years, United Way of St. Lucie County has been viewed as effective, efficient, and experienced in understanding and providing for health and human services needs in St. Lucie County. United Way of St. Lucie County has been in operation since 1962. It was founded by local community leaders to support the health and welfare of the community. United Way recruits individuals and organizations that bring passion, expertise and resources needed to improve lives. We provide the most comprehensive range of health and human services needed in St. Lucie County. Our organization is uniquely positioned to provide resources to a broad range of nonprofit service providers while holding each of them accountable for producing real, measurable results. Each service provided by United Way and our Funded Partner is critically important to the overall health and well-being of our community. Every year, United Way dollars touch the lives of tens of thousands of individuals and families in our community by creating opportunities for a better life for all.

Our three main focus areas are:

EDUCATION

Research tells us that in order to improve graduation rates and make young adults college or career ready, more children need to come to school ready to learn. By 3rd grade, more students need to be reading at grade level. That is why United Way is committed to ensuring new parents, supporting high-quality early learning to ensure children enter kindergarten ready to succeed, providing tutoring and one-on-one mentoring, and after-school programs that focus on academic achievement and character building.

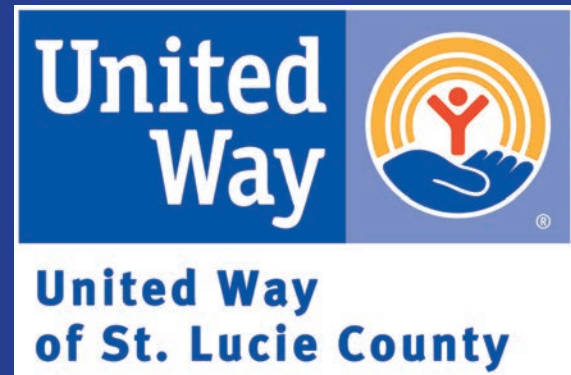
FINANCIAL INDEPENDENCE

Achieving greater financial stability allows lower income working families to move toward financial independence. That's why United Way supports programs and initiatives that alleviate hunger, prevent and rehouse the homeless, assist with education or vocational training, and help families maximize resources and manage household expenses responsibly.

HEALTH

Poor health takes its toll on all aspects of life. Children struggle in school: adults can't be productive at work. That is why United Way seeks to promote healthy living through programs providing mental health services, hearing loss assistance, pediatric dental care, access to healthcare for the uninsured and underinsured, substance abuse treatment, meals for individuals and families and other important services for our community's most vulnerable population.





While perhaps best known for the Annual Campaign, our local United Way helps strengthen our community in many other ways that include:

- **School Supplies for Students**

Some students simply don't have the resources to begin school with the tools they need for academic success. In 1997, the United Way's School Supplies for Students program changed that. Every year, United Way brings together businesses, individuals, civic groups and non-profits to fill a backpack for less fortunate students in this community. The initiative has been a tremendous success, reaching more than 57,000 since the program's inception, and ensuring almost 5,000 children annually receive the gift of a backpack filled with basic supplies prior to their first day of school.

- **FamilyWise prescription assistance program**

United Way plays an important role in the Familywise prescription drug discount program where families and individuals purchase needed medication at a reduced cost. We collaborate with nonprofit agencies and businesses to distribute cards throughout the community. It is estimated that one in every four people in our community struggle to pay for needed prescription medicine. Since the inception of the program in 2008, 27,944 people in our community have saved \$3,177,642 on the cost of their medication.

- **Providing Volunteer Opportunities**

Volunteerism is an important part of the United Way philosophy and Volunteer St. Lucie 'Get Connected' software program provides the vehicle for connecting caring people with opportunities to serve. Some of the areas for service include working with children, elders, aiding in disasters, providing event assistance, fundraising, health care, skilled trades, maintaining and improving the arts, and the environment. Almost 80 non-profit and governmental agencies are registered with Volunteer St. Lucie, making available a wide array of opportunities.

- **Disaster Preparation and Relief**

United Way plays a vital role in a collaborative that includes government, businesses and health and human service agencies. By working together we prevent duplication of services, and help prepare our community before a disaster strikes.

Following the 2004 hurricanes, United Way worked with local businesses, foundations, and other agencies to secure and disperse over \$1,152,528 to help rebuild lives of residents of St. Lucie County and we are committed to continuing that strong partnership throughout future disasters and in the recovery after a disaster.



Our Case for Giving

Why the United Way?



Why United Way?

With over 50 years' history of accessing and responding to priority needs in our community, we continue to rigorously determine the critical needs in our community to ensure financial resources are aligned and used wisely; we call this "Impact Funding". Funds raised here, stay here, improving lives and building a stronger community.

Governed by the highest standards of accountability with strict volunteer oversight, our approach engages caring donors, corporate partners, community and business leaders, local government, non-profit service providers and other key groups in identifying issues, developing solutions, and streamlining the response. We know the best strategies come from collaboration and aligning all available resources around an issue.

The process by which funding decisions are made involves more than 50 trained volunteers. These volunteers spend hundreds of hours reviewing grant applications for funding, examining audited financial information, evaluating goals & outcomes, and conducting site visits, before making grant investment recommendations. United Way focuses on available programs and initiative as community conditions change. Our donors and community partners trust that United Way will continue to be relevant, timely and equitable in responding to the changing needs of our community, now and in the future.

Without United Way there would be no central agency focusing on the broad base of needed services; no one to ensure all are funded at levels that sustain access to the host of programs working to serve at-risk populations. The organization affords donors the opportunity to pool resources, and, through its established, well-respected investment process it invests in programs and initiatives based on documented community needs.

Consider the following points: What agency is positioned to respond to emerging or emergency needs? Would response to a hurricane, for example, be more limited without United Way working alongside first responders? Who would facilitate the types of direct services that United Way provides?



LIVE UNITED™



Filling the Gaps in Services

Dental decay has been determined to be the largest single chronic health problem facing children in our country. When this problem was recognized in St. Lucie County, United Way stepped forward to provide annual resources necessary to successfully address this issue, through its Funded Partner the HANDS Pediatric Dental Program. As a result, each school year over 5,000 children receive dental screening services, and children indicating additional dental services are directed to appropriate services. Prevention is important: United Way now funds the agency's dental sealant program.

The Solution

Critical as it relates to long-term viability, organizations giving due consideration to building an endowment are fiscally responsible, strategic and focused on the needs of today, and on future needs of the community to ensure a continuum of care and to avoid disruption in program services. United Way is constantly working to ensure the organization is positioned to respond to priority needs of our community - now, 10 years from now, and beyond.

As our community continues to grow, the need for health and human services continues to expand. The simple fact is that, each year, United Way receives more requests for funding than it can meet. Although our Annual Campaign raises needed funds in support of a broad range of essential programming and initiatives, United Way faces the challenge of expanding giving opportunities to complement traditional fundraising efforts.

The only way to ensure the sustainability of services long-term, as demands grow and funding sources are affected by fluctuations in the economic climate is to focus on incorporating alternative giving strategies. With the help of community-minded individuals looking to have a significant impact on the future shape of our community, United Way intends to build an endowment to enhance the organization's response to both current and future needs.

With a continued commitment to expanding the opportunities for donors to become engaged in United Way's work and ultimately advance their personal philanthropic priorities, building our endowment is the final component of an over-arching comprehensive resource development plan.

You may already have a significant and meaningful long-term relationship with United Way. We now invite you to take the next step to help ensure that future generations will have the resources to continue improving lives and community conditions. You can do this by making a planned gift to United Way's endowment. These gifts will help by improving lives for generations to come.



Our Case for Giving

How You Can Help The United Way!



Always placing emphasis on our donors and their charitable intent, United Way will accept both restricted and unrestricted gifts to the endowment. Based on direction from each donor, gifts to the endowment will be kept in two separate funds by the United Way.

UNRESTRICTED AND RESTRICTED GIFTS

- Unrestricted gifts to the endowment will serve donors interested in supporting all of the important roles United Way plays in our community. United Way has a long history of honoring its promise to donors, that their contribution will be directed to the greatest areas of need to make the most significant impact possible. This promise will extend to the endowment where the United Way of St. Lucie County's Board of Directors will have discretion in using the available funds on an annual basis.
- Restricted gifts to the endowment will have a more narrow focus and will afford donors the opportunity to perpetuate their gift to the Annual Campaign, ultimately providing resources to the partner agencies and programs United Way supports. In both cases, donors leave a legacy of caring that will extend beyond their life times.

We are here to help whether or not your goal is leaving your legacy, supporting a program/initiative of great interest to you, creating a lasting remembrance of the values you embrace, making yourself happy, supplementing your income, or lowering your taxes. We will partner with you, your family, and your financial advisor to help you achieve your personal philanthropic goals while ensuring that your philanthropic vision is a reality.

Together, we will continue to advance the common good – today, forever.

Our Goal

United Way of St. Lucie County will launch an Endowment Campaign with a goal of securing both current and deferred commitments to help fund the current gap of \$500,000 between agency grant requests from needs in the local community to available funding on an annual basis. Thereafter, growing the endowment will remain a priority component of the over-arching, comprehensive resource development plan.



Ways to give

Outright Gifts: A gift of cash, check, stock, real estate or other forms of personal property given now.

Life Insurance Policies or Retirement Plans: You can name the United Way of St. Lucie County as a beneficiary or partial beneficiary of a life insurance policy that you already own or purchase a policy to donate. The United Way of St. Lucie County can be named as the primary or contingent beneficiary of a retirement plan.

Charitable Bequest: Perhaps the simplest way to make a legacy gift, a bequest is a gift through your will or living trust that allows you to leave a percentage of your estate, a specific amount, or the residue of your estate to United Way.

Publicly Traded Securities: Securities which are publicly traded may be transferred to United Way by signing the stock or bond power appropriately and either delivering the security or giving your broker instructions to transfer the security to United Way.

Non-publicly Traded Securities may be accepted.

Deferred Gifts

Bequests: The donor can specify an amount in dollars or percentages, may designate articles of property, or may leave a remainder of their estate to United Way. Donors may also establish in their will a gift annuity, a unitrust, an annuity trust or a lead trust to benefit the United Way.

Charitable Remainder Trust (Unitrust): The donor during their lifetime irrevocably transfers money, securities or real estate to a trustee (such as a bank) who pays the income to one or more beneficiaries for life or for a fixed term of years. The trust can provide income for the donor's survivor (a spouse or others) for life, and the trust assets eventually benefit the United Way.

Annuity Trust: The donor during their lifetime irrevocably transfers money or securities to a trustee (such as a bank) who pays the named beneficiary (ies) for life (or a fixed term of years) a fixed dollar amount annually. The trust can also provide income for the donor's survivor (a spouse) for life or for the lifetime of others. At the death of the last income beneficiary, the designated trust assets become the sole property of United Way.

Charitable Lead Trusts:

Non-Grantor Lead Trusts - Donors may make a gift to United Way in trust and provide that the trustee shall pay an income to United Way for a fixed period of years. The donor can further provide that at the end of the period of years the trustee will transfer the property to children, grandchildren or other specified persons.

Grantor Lead Trusts - Donors may make a gift to United Way in trust and provide that the trustee shall pay an income to the United Way for a fixed term of years and further provide that the property will return to the donor at the end of the fixed term of years.

Charitable Gift Annuity or Deferred Gift Annuity: These are agreements between the donor and the charity whereby the charity agrees to provide the donor and/or their designee an income for a specified period of time in exchange for assets given by the donor. A Gift Annuity can generate a charitable tax deduction which is determined by numerous factors such as age, rate of return, etc.

NOTE: United Way of St. Lucie County participates in the National Charitable Gift Annuity Program, a service of United Way Worldwide, which offers donors the opportunity to receive a fixed payment for life and leave a lasting legacy to United Way of St. Lucie County.

Pooled Income Fund: This is a trust which allows the donor to retain a life income, claim a current income tax deduction, and make a future gift to charity. This is an irrevocable gift arrangement with United Way Worldwide that allows a donor to receive annual income for life and leave a lasting legacy to United Way of St. Lucie County.

Life Estate Gift: A gift can be made by a donor of a remaining interest in their personal residence, vacation home or farm. The donor can gift a residence to United Way of St. Lucie County while retaining the right to use the property for life, potentially avoiding significant capital gains tax on appreciated property.

Life Insurance: Name United Way of St. Lucie County, Inc. to receive the benefits of life insurance policies that have already purchased, or elect to create a new policy through the United Way Life™ and name United Way St. Lucie County, Inc. as owner and beneficiary of the policy.

Donor Advised Fund: This allows you to make regular recommendations on the distribution of funds to charities.



Our Case for Giving

Help Us Reach Our Goal of Funding the Annual GAP in Community Program Needs

United Way of St. County

Comparison of Agency Requests vs. Amount Available, 2011-2012 to 2015-2016

	FY Year	Requested Amount	Amount Invested	Difference/GAP	% of Request
Education	2011-2012	\$1,125,890	\$528,854	\$597,036	47%
Income	2012-2013*	\$1,106,481	\$676,481	\$430,000	61%
Health	2013-2014	\$1,027,417	\$518,980	\$508,437	51%
	2014-2015	\$1,014,012	\$614,200	\$399,812	61%
	2015-2016	\$1,165,456	\$649,715	\$515,741	56%

\$515,741 in Fiscal Year 2015-2016



Testimonials



Mr. & Mrs. Alto "Bud" Adams

As original founders and long-time contributors to United Way of St. Lucie County, we encourage those who want to make a true impact on our community to consider including United Way of St. Lucie County in their wills and estate planning.

As a resident of Harbour Ridge Yacht & Country Club, Bill has been a United Way Tocqueville Society donor for many years. In order to maintain the community impact of his gifts in the future, he has agreed to make an endowed Tocqueville Legacy gift.



Mr. H. William Lichtenberger



Mr. & Mrs. Clark Thompson

"The Thompsons have been actively involved with United Way as volunteers for many years. Marsha has served on the Board of Directors in various capacities, including as Board Chair. The Thompsons have made a bequest to United Way in their wills, with a future gift of proceeds from a Life insurance Policy."

Our Benefactors

The United Way of St. Lucie County Endowment Fund

George P. Stanich – United Way’s Angel Investor

George P. Stanich personified the American Dream. He was one of 11 children born to a mining family of Yugoslavian immigrants in Great Falls, Montana. He was a proud veteran, serving this great nation in World War II. Most importantly, George was an entrepreneur, moving himself and his wife Ada to Fort Pierce, Florida in 1950 to launch an automobile dealership known as Florida Motors.

***The credo on the wall of George’s office was a reflection of the man himself:
“Some people say I’m really lucky -- the harder I work, the luckier I get.”***

In 1997, the St. Lucie County community sadly lost the innovative businessman who was George P. Stanich. He was gone, but he would not be forgotten. Shortly following his passing, news was received that Mr. Stanich had included the United Way of St. Lucie County in his trust. The organization would benefit from a record 1.4 million dollar gift to be distributed as deemed appropriate to serve the community.

Stewardship of an Endowment Fund – The Stanich Grant Recipient

With an unprecedented windfall in hand, the United Way of St. Lucie County Board of Directors felt obligated to ensure that Mr. Stanich’s gift and spirit lived on in perpetuity. As such, a board-restricted Endowment Fund was planned to expand the financial outreach of the organization responsibly while remaining in alignment with the United Way mission.

In May of 1998, the United Way Board established the Stanich Grant to address specially identified needs and to “enrich the lives of St. Lucie County youth through age 18.” From inception, the award given in honor of its namesake would not erode the principal gift, but be funded solely by the annual interest accrued from the Endowment Fund, plus capital appreciation. Moving forward, the Stanich Grant would remain distinct and separate from the United Way’s general grants process.

The Impact – Better Health = Better Grades

Mr. Stanich’s generous gift, like his legacy, has been lasting. Since the turn of the millennium, every United Way Stanich Grant award has been given in accordance with its established purpose. These funds have been instrumental in improving the quality of life for St. Lucie’s youngest residents. The grants have enhanced after-school programs, purchased educational, playground, and recreational equipment, and even supported the purchase of vehicles to transport children to local health and education programs. Stanich grants have made tremendous impacts both large and small, from addressing school physical needs for entire incoming classes of children, to fitting a needy child with eye glasses or a breathing nebulizer.

\$1,401,759

George Stanich

In 2010, the United Way Board made the decision to use the Stanich Grant to fund a new pediatric dental care program – a lynchpin of overall child health for children ages pre-school thru 2nd grade. This bold decision stemmed from a comprehensive community needs assessment, in addition to a compelling joint report from the St. Lucie County Oral Health Coalition and the St. Lucie County Department of Health. The Surgeon General’s Report on Oral Health estimates that more than 51 million school hours are lost annually in this nation due to dental disease, and that “oral health... must be included in the design of community health programs.” The United Way of St. Lucie County heard this clarion call and directed its efforts to safeguard children from experiencing pain during their formative learning years.

Since inception, the Stanich-driven oral health program has funded over 22,000 screenings, completed or planned in every corner of St. Lucie County. With intensive focus on prevention, health screenings and emergency care, St. Lucie school children are now focusing less on their teeth and more on their studies. The program has been a success, as evidenced by everything from personal family accounts to overall school district achievement levels.

Need Still Exists – A Convincing Reason to Give

George P. Stanich’s incredible philanthropy to the United Way cannot be understated. The gift by his estate has made an indelible mark on the St. Lucie County community, serving the needs of countless children. Moreover, the Board is proud to assert that since the inception of the endowment, the United Way has awarded \$900,000+ in Stanich Grants all while maintaining the complete integrity of the original \$1.4 million gift. As of July 31, 2015, the balance was \$1,502,000.

Despite responsible administration of the Stanich endowment, needs in our community persistently outweigh the funds ability to address them. Quite simply, St. Lucie County and the United Way must constantly seek out more champions like Mr. Stanich.



Ada & George Stanich

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The Spirit of St. Lucie Awards

The Spirit of St. Lucie Awards Program was developed in 2010, as a collaborative initiative between United Way of St. Lucie County and Florida Power & Light, the corporate sponsor of the awards program for the past six years. Amy Brunjes, External Affairs Manager for FP&L and former United Way of St. Lucie County Campaign Chair and Board Member spear headed the initiative.

The program was designed to recognize exemplary service and partnership of businesses within St. Lucie County through community involvement. Eligibility includes any company, governmental entity or agency with a physical presence conducting business or operating in St. Lucie County. The Community Angel Award is specifically for an individual.

The awards are presented each year at the Annual United Way of St. Lucie County/Florida Power & Light Community Leaders Breakfast, which also serves as the official Annual United Way of St. Lucie County Kickoff. The event has a unique theatrical theme each year which has included: *Breakfast with the Stars*, *Breakfast on Broadway*, *Breakfast in Oz* and *Alice in Our Land*.

The award winners are selected by a team of community volunteers who review the submitted applications. The winners are kept in strict confidence and each award is announced by a guest presenter, from a group of guest community leaders, elected officials and past award winners.



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*Sixth Annual
Spirit of St. Lucie Awards*

The Case for Giving



LIVE UNITED



The Caring Power of Our Community





LIVE UNITED™

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**United
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United Way of St. Lucie County