



ANNUAL REPORT

2021-22



United Way
of Palm Beach County

Trustworthy. Efficient. A Champion.



A message from our **CEO & BOARD CHAIR**



Laurie George, Ph.D.
President & CEO



Frank Compiani
Chair, Board of Directors

MISSION

*To ensure that everyone in
Palm Beach County has access to the
basics: a quality education, a place to live,
financial stability, good medical care, and enough to eat.*

Reflecting on the past year brings an immense sense of pride and gratitude for the support United Way of Palm Beach County has received. This year has been filled with remarkable moments of impact and collective change to better serve Palm Beach County residents to enhance the overall quality of life and create opportunities for all.

We received \$4.5 million in federal funding from the Palm Beach County Commissioners under the American Rescue Plan Act (ARPA) to further our hunger relief initiatives. This funding is critical to address hunger relief needs and create sustainable solutions for our community. In partnership with the Palm Beach County Food Bank, these funds will be used to increase food bank capacity with expansion and enhancements to the current food distribution programs, including a commercial kitchen and food processing facility.

United Way of Palm Beach County's Mentor Center, in collaboration with the Palm Beach County Youth Services Department and Children's Services Council of Palm Beach County, launched the Level Up Enhanced Mentoring Program to offer mentorship for youth ages 11 to 19 who are directly involved with or at risk of entering the juvenile justice or dependency system. This program aims to inspire teens and provide opportunities to continue education or career exploration.

As we look forward to the new year, we are enthusiastic and optimistic. We are excited to continue our work, addressing new challenges and creating an even greater impact. Your continued support is crucial in helping us achieve remarkable things to transform our community for the better.

Thank you for being a Community Champion and our partner in impact!

*This group of dedicated leaders and volunteers
make a measurable difference in the lives of those in need.*

EXECUTIVE *Committee*

Frank Compiani, CPA
Board Chair
Community Volunteer

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Immediate Past Chair
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Legal Counsel
Shutts & Bowen LLP

Jennifer Brancaccio
First Horizon

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Campaign Cabinet Chair
Truist Bank

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Tocqueville Society Chair
Member at Large

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Treasurer
CutisCare LLP

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Member at Large
Florida Power & Light Company

Talla McGahee
Member at Large
Publix Super Markets

Meredith Rollo
Community Impact Committee Chair
NextEra Energy, Inc.

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Member at Large
Seacoast Bank

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Secretary
Children's Services Council of
Palm Beach County

BOARD *Members*

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Roger Dean Chevrolet
Stadium

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Shutts & Bowen LLP

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Emeritus Director
Howard Bregman P.A.

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NTW - National Tire Wholesale

Reverend Pamela Cahoon
Community Volunteer

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Patric Edmondson
Modernizing Medicine

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Sikorsky Aircraft

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Fumero, P.A.

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Community Volunteer
EY

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NCCI

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Agency Representative
Healthy Mothers, Healthy Babies
Coalition of Palm Beach County

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Emerging Leaders Chair
RSM

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The McClatchy Company

Arthur Menor, Esq.
Shutts & Bowen LLP

Keith Oswald
The School District
of Palm Beach County

Ana Perera
Bank of America Merrill Lynch

Gina Sabeau
CIBC Private Wealth US

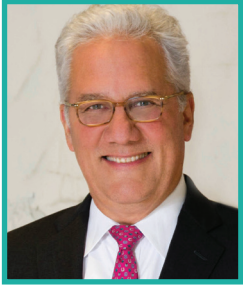
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Women United Chair
Seacoast

Allison Taylor
Audit Committee Chair
Deloitte

Robert vanGiessen
Pratt & Whitney, A Raytheon
Technologies Company

Chandler Williamson
TCG, LLC

BOARD
of Directors



Christopher Chase
Campaign Cabinet Chair

Our 50 MOST GENEROUS CAMPAIGNS

Under the leadership of Campaign Cabinet Chair Christopher Chase, our workplace campaigns are increasing our forward momentum, raising more than \$8 million in 2021-22. Workplace campaigns not only allow us to serve our community by addressing the most critical needs, but also give us the ability to create sustainable solutions to help our neighbors move from surviving to thriving.

Publix Super Markets & Publix Super Market Charities
NextEra Energy / Florida Power & Light Company
Palm Beach County Government Employees
Bank of America Merrill Lynch
NCCI
Costco Wholesale
Pratt & Whitney,
A Raytheon Technologies Company
EY
UPS
BMO Financial Group

Enterprise Holdings
Raymond James & Associates
The School District of Palm Beach County
Johnson Controls
Caring for Postal Families, Inc.
AT&T
PNC Bank
United Way of Palm Beach County Employees
Deloitte
Welltower Inc.
Truist Financial Corporation
Shutts & Bowen LLP

McClatchy
Seacoast National Bank
Palm Beach County Sheriff's Office
Florida Crystals Corporation
Children's Services Council of Palm Beach County
First Horizon Bank
FedEx®
Exelon Corporation
Comerica Bank
Target Stores
Adopt-A-Family of the Palm Beaches, Inc.
Wells Fargo
Children's Healthcare Charity, Inc.
Fifth Third Bank
Aerojet Rocketdyne
Lockheed Martin
RLI Insurance
Berkowitz Pollack Brant Advisors
Regency Centers
Macy's
Legal Aid Society of Palm Beach County
Florida Blue
Gunster Law Firm
StevenDouglas
The Lord's Place, Inc.
TD Bank
Baptist Health South Florida



Our Top 10 **GRANTS RECEIVED**

In 2021-2022, a remarkable \$4.6 million in grant funding was generously awarded by our top 10 grant funders across a diverse range of crucial causes, including hunger relief, mentoring, VITA (Volunteer Income Tax Assistance), disaster relief, and more. These dedicated organizations have played a pivotal role in supporting United Way of Palm Beach County's mission.

\$3,397,677	Children's Services Council of Palm Beach County
\$621,000	Palm Beach County Youth Services
\$225,000	Jim Moran Foundation
\$147,000	Internal Revenue Service
\$73,904	Palm Beach County Community Services
\$55,000	Wells Fargo
\$50,000	Johnson Scholarship
\$26,700	Batchelor Foundation
\$13,000	United Way Worldwide
\$10,000	Florida Blue

Total Funding:

\$4,619,281





MENTOR
Change two lives

5,500
youth were matched
with a mentor

Life Changing Impacts



In collaboration with
Palm Beach County and
the Palm Beach County Food
Bank, we invested in a multi-
year initiative to increase food
distribution and reduce the
number of food insecure Palm
Beach County residents.



Celebrate the Impact **WE'RE MAKING IN OUR COMMUNITY!**



*We fund more than 110
programs and initiatives,
serving 1 in 5 Palm Beach
County residents.*



Mentor Matches

92%
Youth developed
life skills



Graduate & Thrive

99%
Youth graduated
from high school



Access to Care

92%
Individuals experienced
improved health
outcomes

**Data from FY2021-22*

Helping Youth Succeed

United Way funded programs facilitate quality mentoring relationships, promote academic achievement, and prepare youth for employment and post-secondary education.

Funded Programs and Initiatives: 46 | Clients Served: 11,209



Stabilizing Families

United Way funded programs support employment for adults with disabilities, provide financial coaching, teach nutrition education, distribute food, and provide housing stabilization for individuals and families.

Funded Programs and Initiatives: 35 | Clients Served: 160,067



Empowering Healthy Lives

United Way funded programs enroll residents in health care benefits, promote health and wellness, provide primary and mental health care, and offer out-of-school activities, respite care, and medically necessary equipment to children with special needs.

Funded Programs and Initiatives: 22 | Clients Served: 18,236



Fight Hunger

12,792,712

Meals were distributed



Special Needs

100%

Children with special needs developed life skills



Financial Stability

\$12.5M

Tax refunds returned to hard working families through Taxes Filed Free campaign



Housing & Homelessness

93%

Households remained stably housed

FINANCIAL STATEMENT

Statements of Financial Position • October 1, 2021 - September 30, 2022

	2022	2021
Total current assets	\$2,708,967	\$1,917,974
Total non-current assets	21,910,225	26,598,325
Total assets	\$24,619,192	\$28,516,299
Total current liabilities	\$5,610,043	\$4,486,276
Total non-current liabilities	-	-
Total liabilities	5,610,043	4,486,276
Net assets	19,009,149	24,030,023
Total liabilities and net assets	\$24,619,192	\$28,516,299

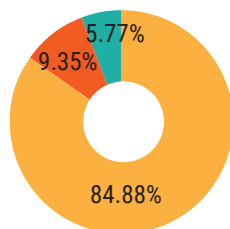
Statements of Activities • Year Ended October 1, 2021 - September 30, 2022

	2022	2021
Contributions and grants	13,564,522	\$29,141,427
Other revenues	718,437	293,655
Gross revenues	14,282,959	29,435,082
Program costs	13,279,731	18,118,492
Fundraising costs	1,463,589	1,310,147
Management and general costs	902,370	775,958
Total expenses	15,645,690	20,204,597
Change in net assets	(1,362,731)	9,230,485
Net unrealized gains (losses)	(3,658,143)	2,535,304
Net assets, beginning of year	24,030,023	12,264,234
Net assets, end of year	\$19,009,149	\$24,030,023

**The financial information presented has been derived from United Way of Palm Beach County's audited financial statements and IRS form 990. An audit was conducted by Daszkal Bolton LLP, who expressed an unqualified opinion. Partner agencies receiving designations from United Way of Palm Beach County's campaign are charged an administration fee based upon amounts received in accordance with United Way Worldwide guidelines.*

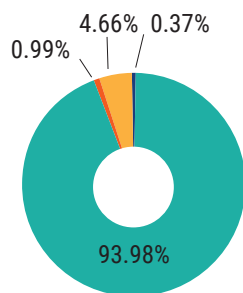
2022

EXPENSES



- Agency Funding & Program Costs
- Fundraising
- Management & General

REVENUE



- Campaign Revenue & Grants
- Program Service Revenue
- Investment Earnings
- Other Revenues

ACCREDITATIONS



"Because United Way of Palm Beach County serves the local community, my gift can help those individuals, families, and even neighbors in their times of need. I am honored to do my small part."

BRETT FRAZEE
Tocqueville Society Chair
2019-2022



Tocqueville Society

United Way of Palm Beach County's Tocqueville Society is comprised of leading philanthropists who understand the value of a major investment in our community, especially when leveraged. Tocqueville Society members achieve the goal by giving a minimum of \$10,000 annually and sharing the opportunity to invest among peers and colleagues. The Tocqueville Society is named after French historian Alexis de Tocqueville, who is recognized, celebrated, and immortalized as the true spirit of volunteerism that lives in the hearts of Americans.

TOCQUEVILLE SOCIETY CABINET MEMBERS

Arthur Bellis (Retired)

Frank Compiani, CPA, RSM US LLP (Retired)

Steve Demeritt, General Mills (Retired)

Edith Di Francesco, Carrier

George Elmore, Hardrives, Inc.

Donna Glenn, NCCI, Tocqueville Cabinet Chair

Guy Millner (Retired)

TOCQUEVILLE
Society

Our Most **GENEROUS DONORS**

MILLION DOLLAR ROUNDTABLE- \$1M+

Countess Henrietta de Hoernle*
Mr. and Mrs. Arthur & Sara Jo Kobacker*
Mr. and Mrs. Harold E. & Mary Ann Perper*
Mr. John F. Scarpa
Ms. MacKenzie Scott
Mr. and Mrs. Raymond Zimmerman

NATIONAL SOCIETY- \$100,000-\$999,999

Mr. James L. Robo and Mrs. Meredith B. Trim
Mr. and Mrs. Paul S. & Leigh Tischler

ORDER OF EQUALITY- \$50,000-\$74,999

Anonymous
Mr. Robert M. Beren*

ORDER OF LIBERTY- \$25,000- \$49,999

Anonymous
Bernard & Pamela Barbash Family Foundation
Mr. and Mrs. Stephen R. & Gabriella Demeritt
Mr. and Mrs. George & Mary Giguere
Mr. and Mrs. Lee S. & Jenny Owen
Mrs. Ramona Ann Spears
Mr. & Mrs. Frank E. Walsh, Jr.
Mr. and Mrs. Jack & Diana Weir

ORDER OF INDEPENDENCE- \$15,000-\$24,999

Anonymous
Anonymous
Mr. and Mrs. William E. & Mary Donnell
Mr. George T. Elmore
Mr. Cary W. Ginter
Mr. and Mrs. Tom A. & Judith Giuffrida
Ms. Martha B. Hartfiel
Mr. and Mrs. Tony & Susan Hunter
Mr. Brinck Lowery
Mr. and Mrs. Stephen C. Moore

* Deceased

SOCIETY MEMBERS- \$10,000-\$14,999

Mr. and Mrs. Arthur P. Bellis
Mr. Jonathan Berger
Mr. and Mrs. Gene & Joyce Bolton
Mr. and Mrs. Larry E. Brown
Mrs. Fabiola N. Brumley
Mrs. Deborah Caplan
Mr. and Mrs. Larry & Christine Carsman
Mr. and Mrs. Al R. & Karen Castaldi
Mr. and Mrs. Frank & Marguerite Compiani
Mr. Sean O. Cooper
Mr. and Mrs. Peter D. & Julie F. Cummings
Mr. Anthony Danieli
Ms. Edith Di Francesco
Mrs. Helga Doyle
Mr. and Mrs. Ray & Nancy Faloon
Mr. Alfonso "Alfy" B. Fanjul
Mr. and Mrs. Sidney E. & Madeline Forbes
Mr. and Mrs. Brett & Brijin Frazee
Mr. Barry Garber
Mr. Alan N. Garcia
Mr. Jim Sahnger & Dr. Laurie J. George
Ms. Melanie Sunshine Giorno
Mr. and Mrs. Justin & Donna Glenn
Mr. and Mrs. Kenneth L. & Summer J. Groves
Gursahaney Family Foundation
Mr. and Mrs. Lew & Sherry Hay III
Mr. & Mrs. John Ketchum
Mr. and Mrs. Howard & Kerrie Lance
Mr. and Mrs. H. Irwin* & Ellen Levy
Mr. & Mrs. Gregory Magreta
Mr. John P. Marasco
Mr. and Mrs. Sergio A. Mariaca
Mr. W. James McNerney, Jr.
Mr. and Mrs. Arthur J. & Suzanne Menor
Mr. and Mrs. Brand & Pamela Meyer
Mr. and Mrs. Jack W. Nicklaus
Ms. Heather Nisbeth
Mr. and Mrs. James E. Perrella
Lawrence Sanders Foundation
Mr. and Mrs. Michael & Gannon Schaefer
Mr. Eric Silagy
Dr. Douglas Simon
Mr. John Slyh
Mr. and Mrs. Jeffrey A. Sopshin
Mr. and Mrs. William F. Striebe, Jr.
Mr. & Mrs. Timothy Wilhelmy
The Wilkens Family Foundation
Mr. and Mrs. Del* & Barbara Williamson





LEADERS UNITED

*Our membership groups get involved in all kinds of ways
- big, small, but always important - to create change that lasts
within our community.*



*In 2021-2022,
our Leaders United groups
had over 1,000 members and donated
more than \$1.4 million.*



EMERGING LEADERS

This group offers local early to mid-career professionals access to exclusive events and volunteer projects to connect with other like-minded individuals.



154 Members
\$74,619 Donations



WOMEN UNITED

This network of philanthropic leaders strive to engage, empower, and educate like-minded women to strengthen our community.



136 Members
\$155,593 Donations



LEADERSHIP CIRCLE

These local leaders trust in United Way to make the most meaningful impact and produce smart solutions to meet the needs of our community.



789 Members
\$1,203,115 Donations

*Thank you to
these local companies
for their valuable volunteer time.*

CORPORATE VOLUNTEERISM

Statistics show that consumers are attracted to companies that are responsive to local needs. Ultimately, focusing attention on social responsibility enhances your business.

United Way of Palm Beach County's Corporate Involvement Program is a resource your company can use to demonstrate social responsibility right here in our community.

Bank of America Merrill Lynch

BDO

Deloitte

Holland & Knight

Humana

Johnson Controls

Key Private Bank

LexisNexis Risk Solutions

Literacy AmeriCorps

Meet Up Group

NextEra Energy /

Florida Power & Light Company

NCCI

Palm Beach Atlantic University

Palm Beach State College

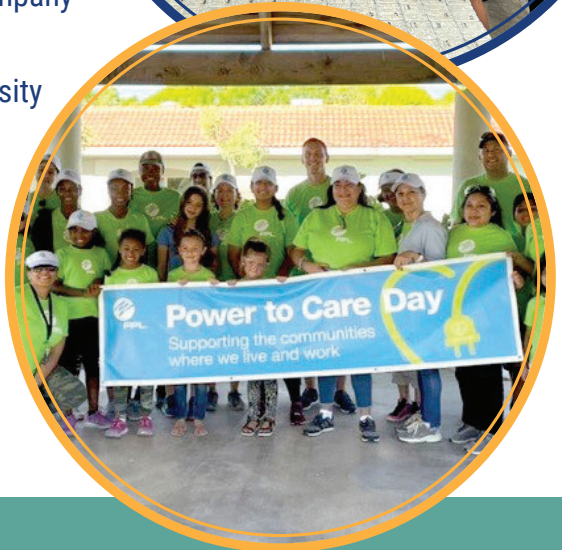
PNC

Regency Centers

RSM

Sikich

TBC Corporation



The Volunteer Center plays an integral role in United Way of Palm Beach County's mission to change lives and shape our community.

Our volunteer program aims to make volunteering easy and flexible to fit everyone's busy schedule. Volunteer opportunities are available for individuals, families, organizations, and corporations.

The Value of Our Volunteers in 2021-22

\$6.4 million
total monetary impact



214,161
volunteer hours



\$29.95 value per unit of time
for each volunteer hour

Connecting People to Critical Resources.



Trustworthy. For more than 93 years, United Way of Palm Beach County has served as the trusted local leader, identifying and addressing our community's most critical needs.

Efficient. Our team of community investment experts monitor United Way funded programs, ensuring targeted results are achieved. Donors can be assured that their dollars are being put to work in the best way possible, where they are needed the most.

A Champion. We fight for those who do not have a voice and support the nonprofits that serve them. By uniting key stakeholders and local leaders, we provide strategic solutions to community challenges.



UnitedWayPBC.org

477 S. Rosemary Ave. | #230
West Palm Beach, FL 33401



/UnitedWayPBC