



United Way
of Palm Beach County



ANNUAL REPORT

22
23



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.

This past year has been transformative for United Way of Palm Beach County. We have developed a strategic plan to create sustainable, impactful change, guiding our future efforts to enhance funding, foster community partnerships, and address our community’s most pressing needs. This plan underscores our dedication to improving lives and creating opportunities for all residents of Palm Beach County.

Our hunger relief efforts have made significant strides, particularly in the Glades area, earning the Glades S.T.A.R. Performer Award. This recognition reflects our ongoing commitment to addressing food insecurity in our community. In addition, through collaborative efforts, we made a significant investment in the future of hunger relief with the Palm Beach County Food Bank Community Kitchen and Food Processing Facility. The \$10.7 million facility, funded in part by a \$3 million investment from United Way of Palm Beach County through the MacKenzie Scott Gift and a \$5.7 million contribution from Palm Beach County through the American Rescue Plan Act (ARPA), will expand hunger relief efforts and allow for healthy and nutritious food to reach more people in our community.

Additionally, our Mentor Center, in partnership with the Palm Beach County Youth Services Department and the Children’s Services Council of Palm Beach County, has been recognized with a Best in Category for Children and Youth Achievement Award from the National Association of Counties. The Enhanced Mentoring Engagement Program (Level Up), serving over 600 youth and families since 2021, continues to provide invaluable mentorship opportunities for youth in or at risk of entering the juvenile justice or dependency systems. As we look forward to the coming year, we remain enthusiastic and optimistic. We are excited to continue our work, address new challenges, and create an even greater impact.

Your continued support is crucial in helping us achieve remarkable things and transform our community for the better.

THIS GROUP OF DEDICATED LEADERS AND VOLUNTEERS

make a measurable difference in the lives of those in need.

BOARD Executive Committee

Frank Compiani, CPA
Chair, Board of Directors
Community Advocate

Craig Jenkins, CPA
Vice Chair, Board of Directors
CutisCare, LLP

Kim Jones
Immediate Past Chair, Board of Directors; Governance Committee Chair
Tropical Vibes

Rikki Bagatell, Esq.
Legal Counsel
Shutts & Bowen, LLP

Mike Bauer
Member at Large
Roger Dean Chevrolet Stadium

Jennifer Brancaccio
Secretary, Board of Directors;
Strategic Planning Committee Co-Chair
First Horizon

Donald Byrd
Diversity, Equity, and Inclusion Committee Chair
NTW - National Tire Wholesale

Christopher Chase
Campaign Cabinet Chair
Cross Keys Capital, LLC

Patric Edmondson
Member at Large
Community Advocate

John Fischetti
Community Impact Committee Chair
Sikorsky Aircraft

Tony Hunter
Strategic Planning Committee Co-Chair
McClatchy

Ana Perera
Member at Large
Bank of America

Allison Taylor
Treasurer, Board of Directors; Finance Committee Chair
Deloitte

BOARD Members

Adam Bregman, Esq.
Shutts & Bowen, LLP

Howard Bregman, Esq.
Emeritus Director
Howard Bregman, P.A.

Erika DeBlasi
Women United Chair
Advisor Expressions

George T. Elmore
Emeritus Director
Hardrives, Inc.

John F. Flanigan, Esq.
Emeritus Director
Nason, Yeager, Gerson, Harris & Fumero, P.A.

John L. Gall, Jr.
Labor Representative
Pratt & Whitney, A Raytheon Technologies Company

Alan Garcia
EY

Donna Glenn
Tocqueville Society Cabinet Chair
NCCI Holdings, Inc.

Michelle Gonzalez
Agency Representative
Healthy Mothers, Healthy Babies

Eva Greene
Emerging Leaders Chair
RSM US, LLP

Henry Moreno, Esq.
MISSION UNITED Advisory Chair
Holland & Knight

Keith Oswald
School District
of Palm Beach County

Meredith Rollo
Community Impact Committee Vice Chair
NextEra Energy, Inc.

Gina Sabean
CIBC Private Wealth Management

Robert vanGiessen
Pratt & Whitney, A Raytheon Technologies Company

Caroline Villanueva
Florida Crystals Corporation

Chandler Williamson
TCG, LLC



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. 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.

*Tocqueville Society members are generous contributors who annually donate \$10,000 or more to create lasting change in our community. This year, under the leadership of Tocqueville Society Chair Donna Glenn, the Society raised over **\$1 million**.*

TOCQUEVILLE SOCIETY CABINET MEMBERS

- Jennifer Bellis, US Bank
- Steve Demeritt, General Mills (Retired)
- Edith Di Francesco, Carrier
- Donna Glenn, NCCI, Tocqueville Cabinet Chair
- Jessica Geoffroy, NextEra Energy
- Melanie S. Giorno, EY

TOCQUEVILLE SOCIETY MEMBERS



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. and Mrs. Paul S. & Leigh Tischler

ORDER OF FRATERNITY - \$75,000 - \$99,999

- Mr. and Mrs. Stephen & Gabriella Demeritt

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

- Anonymous
- Mr. and Mrs. Tony & Susan Hunter
- Mr. and Mrs. Lee & Jenny Owen

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

- Anonymous
- Mr. and Mrs. Bernard & Pamela Barbash
- Mr. Robert M. Beren*
 - Robert M. Beren Foundation
- Mrs. Ramona Ann Spears
- Mr. James L. Robo & Mrs. Meredith B. Trim
- Mr. and Mrs. Frank & Mimi Walsh
 - Sandy Hill Foundation
- Wilkens Family Foundation

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

- Mr. & Mrs. Anthony Danieli
- Mr. and Mrs. William & Mary Donnell
- Mr. George Elmore
- Mr. and Mrs. Cary & Robin Ginter
- Mr. and Mrs. Tom & Judith Giuffrida
- Mrs. Martha Hartfiel
- Mr. Daniel Kowarski
- Mr. H. Irwin Levy* & Mrs. Ellen Levy
- Mr. Brinck Lowery
- Mr. and Mrs. Stephen & Cathy Moore
- Mr. and Mrs. Jack & Barbara Nicklaus
- Mr. and Mrs. Michael & Gannon Schaefer
- Mr. and Mrs. Roger Walcott, Jr.

* Deceased

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

- Anonymous (2)
- Mr. and Mrs. Arthur & Sunny Bellis
- Ms. Jennifer Bellis
- Mr. and Mrs. Eugene & Joyce Bolton
- Mr. and Mrs. Larry & Dominique Brown
- Mrs. Fabiola Brumley
- Mr. Dan Cane
- Mrs. Deborah Caplan
- Mr. and Mrs. Larry & Christine Carsman
- Mr. and Mrs. Alexander & Karen Castaldi
- Mr. and Mrs. Julie & Peter Cummings
- Mrs. Helga Doyle
- Mr. Ray Faloon
- Mr. and Mrs. Sidney & Madeline Forbes
- Mrs. Edith Di Francesco
- Mr. and Mrs. Alan & Kimberly Garcia
- Ms. Melanie S. Giorno
- Mr. and Mrs. Justin & Donna Glenn
- Mr. and Mrs. Kenneth & Summer Groves
- Mr. and Mrs. Naren & Judy Gursahaney
- Mr. and Mrs. Lewis & Sherry Hay
- Mr. and Mrs. Melvin & Marsha Johnson
- Mr. and Mrs. John & Michelle Ketchum
- Mr. and Mrs. Howard & Kerrie Lance
- Mr. and Mrs. Sergio & Andrea Mariaca
- Mr. and Mrs. Joseph & Janie-Lyn McCleneghen
- Mr. W. James Mc Nerney, Jr.
- Mr. and Mrs. Arthur & Suzanne Menor
- Mr. and Mrs. Brand & Pamela Meyer
- Mr. and Mrs. Mark & Janean Mileusnic
- Mr. and Mrs. James & Dianna Perrella
- Dr. Laurie George and Mr. Jim Sahnger
- Lawrence A. Sanders Foundation
- Dr. Douglas Simon
- Mr. and Mrs. Bill & Donna Striebe
- Mr. Trent Swanson
- Mr. and Mrs. Del* & Barbara Williamson





OUR MEMBERSHIP GROUPS

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



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



93 Members
\$93,316 in Donations



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



184 Members
\$277,229 in Donations



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



991 Members
\$1,422,197 in Donations

THANK YOU TO OUR COMMUNITY AND CORPORATE VOLUNTEERS for their valuable time.

United Way of Palm Beach County's Volunteer Engagement Center offers a wide range of traditional volunteerism events, including group projects and team-building exercises. We are proud to say that more than 9,000 corporate and community volunteers donated their time and talents to support local nonprofits throughout the year. Projects included filling and distributing literacy kits for early readers, painting the homes of residents in need, gleaning fruits and vegetables, and sorting food for individuals experiencing food insecurity.



CORPORATE VOLUNTEERS

Amazon

Bank of America

Merrill Lynch

BDO

Berkowitz Pollack Brant

Advisors + CPAs

Clerk of the Circuit Court
& Comptroller, Palm Beach
County

Deloitte

Farm Credit of Florida

Florida Atlantic University

Florida Public Utilities

Jonathan's Landing Golf Club

LexisNexis Risk Solutions

Literacy AmeriCorps

Meet Up Group

Mariaca Wealth Management

Modernizing Medicine

Munich Reinsurance America, Inc.

NextEra Energy/Florida Power &
Light Company

NCCI

Northwestern Mutual

Palm Beach Atlantic University

Palm Beach North County Chamber

PNC

Regency Centers

Regions Bank

RNnetwork

School District of Palm Beach
County

Silverview Credit Partners

TBC Corporation

University of Miami



The Value of Our Volunteers in 2022-23



\$7.5 million
total monetary impact



237,065
volunteer hours



\$31.61
value per volunteer hour



STABILIZING FAMILIES

\$6,208,797

invested in programs that supported employment for adults with disabilities, provided financial coaching, taught nutrition education, distributed food, and provided housing stabilization for individuals and families.

13,561,301

meals were distributed

90%

individuals and families remained stably housed

\$9.6 million

tax refunds returned to hardworking households through Taxes Filed Free campaign



HELPING YOUTH SUCCEED

\$3,118,820

invested in programs that facilitated quality mentoring relationships, promoted academic achievement, and prepared youth for employment and post-secondary education.

5,879

youth were matched with an adult mentor

100%

youth graduated from high school

96%

youth increased their college and career preparation skills



EMPOWERING HEALTHY LIVES

\$1,973,400

invested in programs that enrolled residents in healthcare benefits, promoted health and wellness, provided primary and mental health care, and offered out-of-school activities, respite care, and medically necessary equipment to children with special needs.

535

pieces of durable medical equipment provided to children with special needs

96%

individuals experienced improved health outcomes

82%

caregivers of children with special needs overall quality of life improved



STABILIZING FAMILIES, HELPING YOUTH SUCCEED, EMPOWERING HEALTHY LIVES

MENTOR Change two lives

ENHANCED MENTORING ENGAGEMENT PROGRAM

Known locally as Level Up, this initiative, launched in 2021, offers crucial mentoring opportunities to teens aged 11 to 19 who are involved with or at risk of entering the juvenile justice or dependency systems.



265

youth served



149

youth received
direct mentorship



96%

of youth involved
did not engage in
criminal activity



MISSION UNITED made a tremendous impact in its first year, addressing the growing needs of Palm Beach County's veteran community. With over 73,000 veterans in the county, the program awarded \$250,000 in grants to eight agencies, supporting more than 1,500 veterans and their families. These funds helped address critical needs such as healthcare, housing, food, transportation, and legal assistance, ensuring veterans and their families received the support they deserve.

Faith*Hope*Love*Charity

Forgotten Soldiers

Grey Team

Habitat for Humanity
Palm Beach County

Legal Aid Society of Palm
Beach County

Salvation Army Palm Beach
County

Unified Dream

Wounded Veterans Relief Fund



26,263

meals distributed
to local veterans



100%

veterans received
healthcare
services



46

veterans
received housing
assistance



EXPANDING HUNGER RELIEF in Palm Beach County

United Way of Palm Beach County's Hunger Relief Team received the S.T.A.R. Performer Award from the Glades S.T.A.R. community partnership group, celebrating their significant hunger relief efforts. United Way has closely collaborated with the Federation of Families and the faith-based community to support impactful programs such as the Family Weekend Backpack program, Summer BreakSpot program, and the Federation of Families' Tri-City Garden project. This recognition underscores United Way's unwavering commitment to combating hunger and providing crucial food access to families in need throughout Palm Beach County.



Community Impact



20 YEARS of Taxes Filed Free! ::::



During the 2023
tax season:

\$9.6M

tax refunds

\$2.8M

earned income tax credits

\$14.3M

economic impact

\$2.3M

child tax credits

\$1.6M

saved in tax prep fees

The Volunteer Income Tax Assistance (VITA) program is an invaluable service United Way of Palm Beach County has been providing to the community for 20 years. It offers services to individuals and families with low-to-moderate incomes who are eligible for tax credits. The program has prepared more than 177,000 tax returns, yielding over \$277 million in refunds and providing an estimated \$412 million economic impact for Palm Beach County.



105 VOLUNTEERS
recruited, trained
and deployed



5,555 hours



\$176,649
In-Kind value



16 sites county wide
10 mobile sites

Community Impact

OUR 50 MOST GENEROUS CAMPAIGNS

United Way of Palm Beach County is proud to partner with so many organizations committed to building a better, brighter community for all. From October 1, 2022, through September 30, 2023, under the leadership of Campaign Cabinet Chair Christopher Chase, our corporate partners raised \$5.3 million through corporate and employee giving.

1. 

2. 

3. 

4. 

5. 

6. 

7. 

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9. 

10. 

Adopt-A-Family of the Palm Beaches, Inc.

AT&T

Baptist Health South Florida

Baxter & Woodman Company

Berkowitz Pollack Brant Advisors

Caterpillar

Centene Corporation

Clerk & Comptroller, Palm Beach County

Deloitte

Enterprise Holdings

Exelon Corporation

FedEx®

Gunster Law Firm

Holyfield & Thomas LLC

Intl Brotherhood of Electrical Workers

Legal Aid Society of Palm Beach County

M&T Charitable Foundation

Macy's

McClatchy

Modernizing Medicine, Inc.

Nationwide Insurance

Nelson Mullins Riley & Scarborough LLP

Office Depot

Paychex Payroll Services

PNC Bank

Pratt & Whitney – A Raytheon Technologies Company

Raymond James & Associates

Regency Centers

RSM US LLP

Seacoast National Bank

Shutts & Bowen LLP

South Florida Water Management District

Target Stores

TD Bank

The Lord's Place, Inc.

United Way of Palm Beach County Employees

Wells Fargo

WPTV NewsChannel 5

WR Grace & Co.

OUR TOP GRANTS RECEIVED

In 2022-2023, 35 grant funders generously awarded United Way of Palm Beach County \$8,069,489 in grant funding. These organizations support our programs and initiatives through generous grant funding and corporate gifts, allowing United Way to work toward a community where every child, individual, and family thrives.

\$3,510,706	Children's Services Council of Palm Beach County
\$670,000	Palm Beach County Youth Services
\$250,000	Jim Moran Foundation
\$147,000	Internal Revenue Service
\$105,000	Louis D. Srybnik Foundation*
\$84,900	Palm Beach County Community Services
\$63,426	Community Foundation for Palm Beach & Martin Counties*
\$55,000	Wells Fargo
\$40,000	Bank of America
\$28,000	Batchelor Foundation

Total Funding:
\$8,069,489

Berkowitz Pollack Brant Advisors*

Bob Woodruff Foundation*

CSX Transportation*

First Horizon Foundation*

Florida Blue Foundation

Florida Prosperity Partnership*

Gulfstream Aerospace

LexisNexis Risk Solutions

The Lowe II Foundation

The M&T Charitable Foundation

Munich Reinsurance America*

NCCI Holdings, Inc.

NextEra Energy, the parent company of FPL

PNC Foundation

Points of Light*

Pratt & Whitney – A Raytheon Technologies Company*

Regions Bank

RSM US Foundation

Silverview Credit*

TBC Corporation

Third Federal Savings & Loan

United Way of Florida/FL Blue*

United Way Worldwide/EFSP

United Way Worldwide/Truist*

WaWa Foundation*

* New grantors this FY 22-23

CORPORATE Campaigns

GRANT Funders

FINANCIAL STATEMENT

FINANCE Committee

Allison Taylor
Craig Jenkins, CPA
Adam Bregman, Esq.
Frank Compiani, CPA
Anne E. Cantwell
Tammy Clark

ACCREDITATIONS



Statements of Financial Position • September 30, 2023 - September 30, 2022

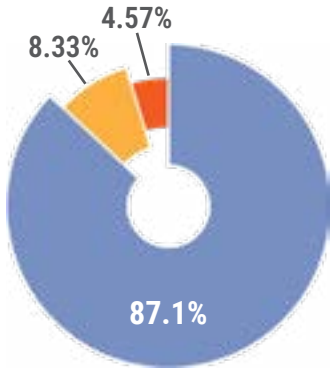
	2023	2022
Total current assets	\$2,815,516	\$2,708,967
Total non-current assets	21,226,686	21,910,225
Total assets	\$24,042,202	\$24,619,192
Total current liabilities	\$4,804,531	\$5,610,043
Total non-current liabilities	291,136	-
Total liabilities	5,095,667	5,610,043
Net assets	18,946,535	19,009,149
Total liabilities and net assets	\$24,042,202	\$24,619,192

Statements of Activities • Year Ended September 30, 2023 - September 30, 2022

	2023	2022
Contributions and grants	16,495,215	13,564,522
Other revenues	734,966	718,437
Gross revenues	\$17,230,181	\$14,282,959
Program costs	16,534,465	13,279,731
Fundraising costs	1,581,514	1,463,589
Management and general costs	868,207	902,370
Total expenses	\$18,984,186	\$15,645,690
Change in net assets	(1,754,005)	(1,362,731)
Net unrealized gains (losses)	1,691,391	(3,658,143)
Net assets, beginning of year	19,009,149	24,030,023
Net assets, end of year	\$18,946,535	\$19,009,149

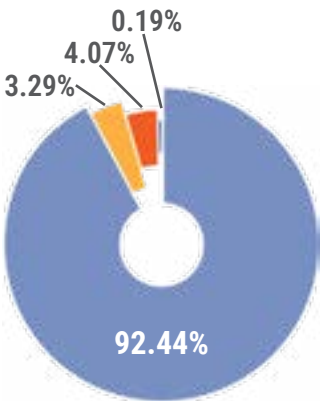
**The financial information presented has been derived from United Way of Palm Beach County's audited financial statements and IRS form 990. An audit was conducted by Holyfield & Thomas, who expressed an unqualified opinion. Partner agencies receiving designations from United Way of Palm Beach County's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

EXPENSES



- Agency Funding & Program Costs
\$16,534,465
- Fundraising
\$1,581,514
- Management & General
\$868,207
- Total Expenses
\$18,984,186

REVENUE



- Campaign Revenue & Grants
\$15,927,992
- Program Service Revenue
\$567,223
- Investment Earnings
\$701,793
- Other Revenues
\$33,173
- Total Revenues
\$17,230,181



● ●
● ● **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 Avenue, #230
West Palm Beach, FL 33401



/UnitedWayPBC

