PEOPLE

Bank on Team Marine for an inspired United Way plan

BY MARY SCHENKEL
Staff Writer



Mary Cone, Bill Penney and Georgia Irish. PHOTO: DENISE RITCHIE

The public portion of the United Way of Indian River County 2017-18 Annual Campaign will begin Oct. 14 with the announcement of this year's goal at the Day of Caring and Campaign Kick-off Breakfast. But the Team Marine campaign chairs have actually been hard at work since even before the campaign's official July 1 start date.

Representing Marine Bank & Trust Company, this year's campaign co-chairs are President/CEO Bill Penney; Mary Cone, residential/consumer lending vice president; Georgia Irish, business development/client services vice president; and Kim Prado, branch manager/vice president.

"The four of us are going to be the face of the campaign but it's really about the whole team," says Penney, referencing employees of the bank, founded in 1997. "We're going to try to involve everybody in some aspect of the campaign."

Their United Way liaison is Tracey Segal, UW campaign director, who says that in choosing campaign chairs, "we look for community minded folks; familiar faces in the community, who have a strong understanding of the United Way and a level of engagement within the community."

Team Marine clearly meets the criteria.

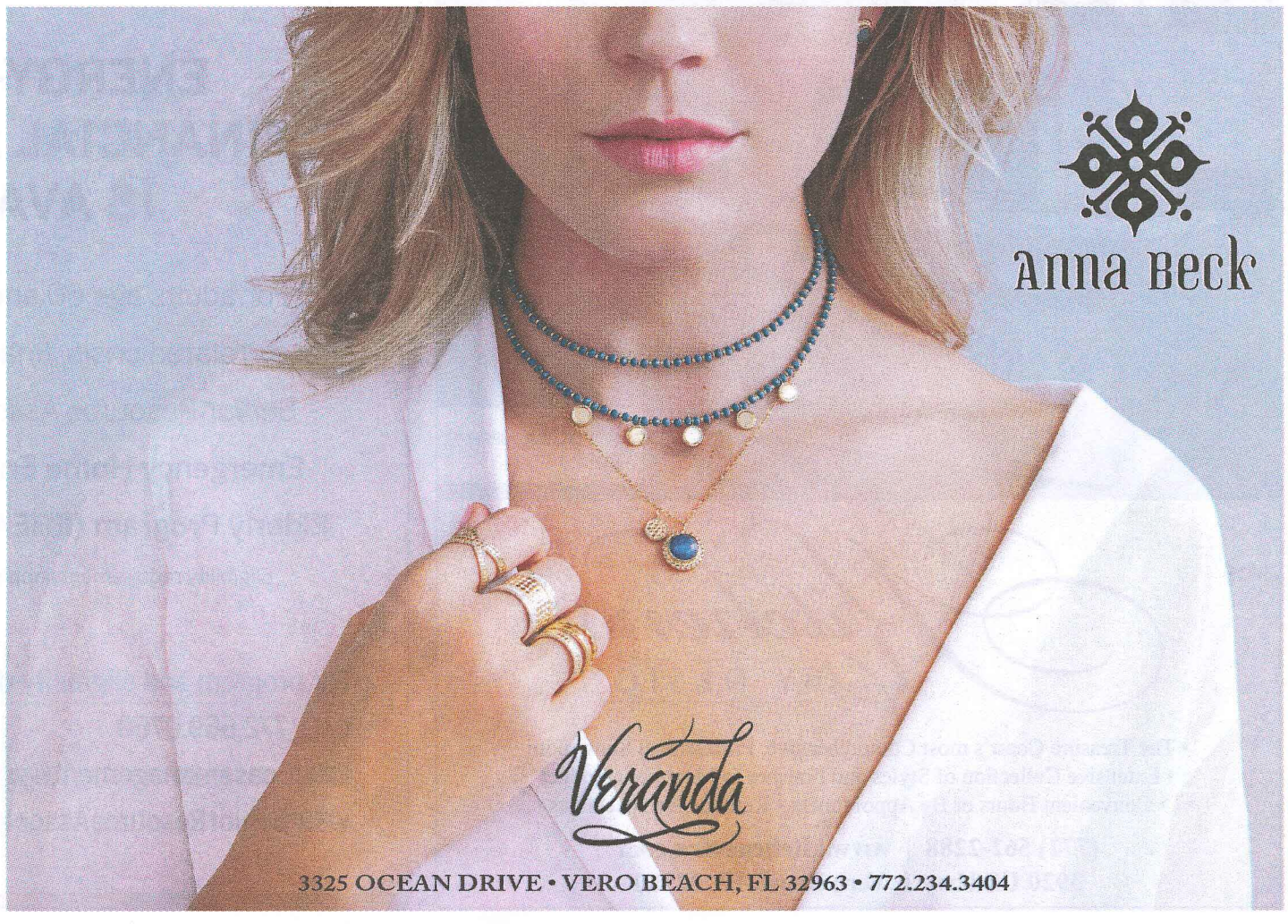
"We've had a long-term commitment to the community and of encouraging employees to give back to the community from where we make our living," says Penney. In addition to serving two terms on the United Way board, Penney previously co-chaired campaigns with wife Karen in 1999/2000 ("Y2K" Penney notes with a smile) and with Alan Polackwich in 2006/07.

"I don't think there are many organizations that we haven't touched or been a part of over the years," adds Cone, one of just two employed at the bank the full 20 years. "And we've pretty much been involved in every area of the United Way."

In addition to serving on the United Way board and various committees, employees have actively volunteered with numerous local organizations, including the Alzheimer & Parkinson Association, American Cancer Society, Board of Realtors, Environmental Learning Center, Habitat for Humanity, Healthy Start Coalition, Hibiscus Children's Center, IRC Chamber of Commerce, March of Dimes, Ocean Research & Conservation Association (ORCA), Oceanside Business Association, Treasure Coast Builders, Vero Beach Air Show and Youth Guidance.

Penney says that despite its size, the bank will again be a campaign Torch Bearer, meaning a $12,000 contribution. "That's a pretty big commitment for a small group of employees. We've always had a very successful employee campaign here at the bank. One of the things I personally like about the

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United Way is that it touches so many different agencies. If you're only to do one thing and make one donation, it's a way to touch a lot of people and a lot of agencies."

The co-chairs and Segal have had a busy summer, building the campaign cabinet, planning their strategy and reviewing the campaign's five business divisions – Agra-Business, Commerce and Industry (small businesses), Finance and Allied Professionals (insurance companies, law firms and banks, etc.), Healthcare and Public Service (such as governmental entities and nonprofits).

Volunteers assist the campaign in a variety of ways, such as the campaign cabinet, which helps with solicitations to businesses within the five divisions plus residential communities; the major accounts team, which calls on workplace CEOs to discuss their internal workplace campaigns; loaned executives, who make presentations at the various workplaces; and in the spring, on the citizen review panel, which determines agency fund allocations.

One of the more critical tasks is developing a realistic campaign goal.

"We had a group of people doing the CEO calls, where we go visit the CEOs of the different organizations to say, 'here's a history of your employee and corporate giving,' thanking them for what they've done and asking 'what can we do to keep it going and make it a little bit better?'" says Penney. "That helps put together the campaign goal."

After recently attending a meeting of Publix store managers he came away impressed with the group's passion and generosity, noting their contributions last year amounted to close to $600,000 of the $3.035 million campaign. "Publix is an amazingly philanthropic company, not only for United Way but all the other nonprofits. We were there to say 'thank you; keep it going.'"

There are also residential campaigns, such as the one at John's Island being run by Dave and Sharon Northrup, and Penney made sure to meet with them before they left for the summer.

The cabinet will soon meet to review historical data and the results of recent CEO discussions.

"We'll roll it up and come up with a number, a really big number. You always want to set the goal a little bit higher," says Penney. "And then we'll roll the goal out on the Day of Caring."

"The process is really very involved," says UWIRC CEO Michael Kint, who has every confidence that Team Marine is up to the challenge. "Clearly, they want to make sure it's done well and that it's a success. There's a lot of psychological and mental engagement in every aspect of this. This is Bill's third term; nobody else has done that before."

"We're not all going to be at everything, but there's four of us and we all are versed in this, so we will be there to help out as needed," says Penney. "You really have support from all parts of the community; it's very broad-based."

"Our work and our reputation is solid and people always want to see us succeed so they'll do what they can to help," says Kint.

Once campaigns are underway, loaned executives will arrange with businesses to make pitches to their employees, often including a talk by a partner agency to build compassion and help them better understand the needs.

"One thing we're going to do this year that we haven't done in the past, is we're going to be taking all of our team, each employee, out to visit the different agencies," says Cone of their own workplace campaign plans. "We'll be taking them out 10 at a time to visit with the different agencies that United Way supports to get each member of our organization involved."

"We've had a couple of employees with the bank who say that if it weren't for United Way services they wouldn't be where they are today," says Irish. "It's really something when you can see the results."

"It's not about the United Way, it's not about the agencies; it's about the people that the agencies help," says Penney.

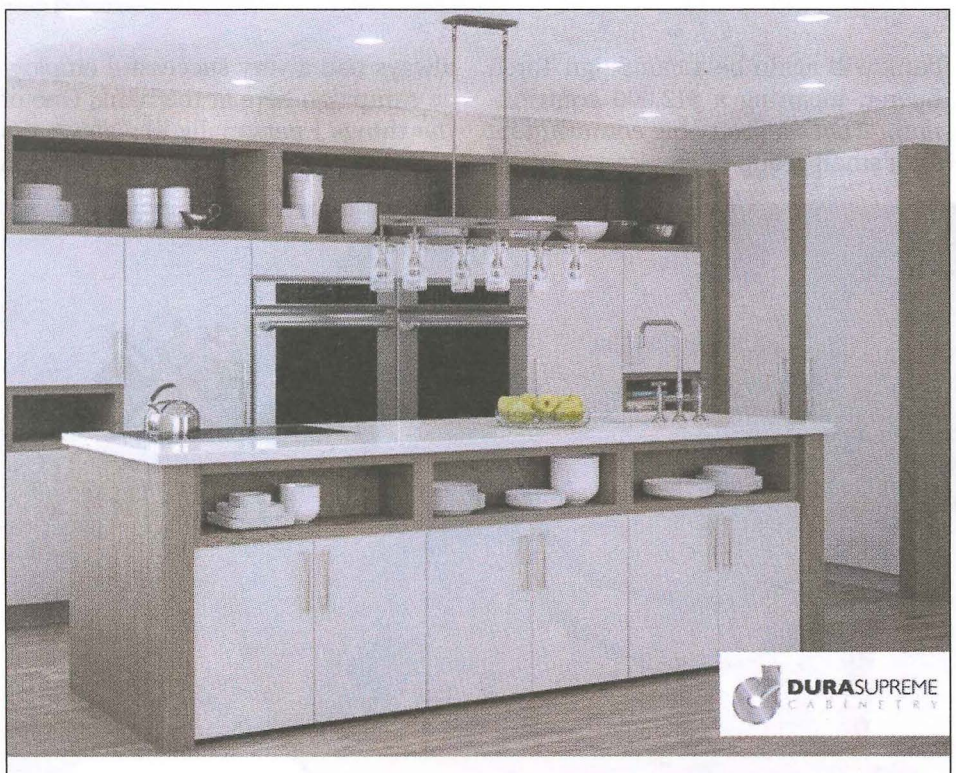
Cone agrees adding, "You don't get the full impact until you visit the agencies."

In the spring, the citizen's review process will involve roughly 100 volunteers reviewing the grant applications and financials submitted by the various agencies and doing on-site visits before recommending the amounts the agencies should be funded.

"The distribution of the money is decided by local citizens, so there's tremendous accountability and it stays local," says Penney.

"We have a very generous community; they see the need. They see the benefits of their United Way investments and they continue to give generously. And we appreciate that," says Segal.

The United Way is always in need of volunteers. Visit UnitedWayIRC.org or VolunteerIndianRiverCounty.org for more information. ■



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