2016 Annual Report
Fostering vibrant small business communities through mentoring and education
At SCORE, our vision focuses on results. At SCORE, our vision is that every person has the support necessary to thrive as a small business owner. Our clients' success is the true measure of our success. More than fifty years after the inception of SCORE, 2016 has proven to be a successful year indeed, with 142,610 clients opening 54,000 new businesses and creating 79,000 new jobs.

The results of SCORE's 2016 Client Impact Survey are not only rewarding to read, but demonstrate that our mentoring works. 96% of SCORE's 2016 clients who were in operation for more than one year when they came to SCORE remain in business, while 84% of clients who started or acquired a business while receiving services from SCORE stayed in business. SCORE also helped to grow revenue of 64% of its small business mentoring clients in 2016.

While these numbers are impressive in aggregate, nothing can outshine our clients' individual stories of passion, perseverance and the challenges overcome on the way to success. Zeponic Farms owner Zack Zeph grows healthy, hydroponic produce while employing individuals with special needs in the Washington, D.C., area. Zeph worked with mentor Len Johnson to perfect his business plan and marketing materials, while SCORE's Grow Your Business webinar taught him how to successfully secure his first loan.

Mentor Munir Saltoun helped SCORE client The Alliance for Positive Change to create a financial plan to recover from the 2008 recession. Today, the nonprofit is fulfilling its mission of empowering and caring for more than 5,000 New York City-area clients living with or at-risk for HIV and AIDS.

The positive impact our small business clients have on their communities and on the U.S. economy is directly attributable to the talents and dedication of our volunteers. SCORE's 10,000 volunteer mentors collectively represent 300,000 total years of business experience. In 2016, SCORE volunteers donated 2.2 million hours through mentoring, educational workshops and chapter operations, resulting in a 9% increase in total chapter services.

As SCORE looks towards the future, we continue to strategize innovative solutions to meet our clients' needs. Initiatives such as the virtual conferences and the video mentoring pilot meet the remote learning needs of clients who may not live near a SCORE chapter.

Effectively serving SCORE clients of the future also means ensuring that our client and volunteer base reflects the diverse faces of the U.S. population. In 2016, 58% of SCORE clients were women; 35% were minorities; and, 11% were veterans. Among our volunteers, 27% were minorities and 20% were women (an increase from 17% in 2015). A women's cohort in our volunteer corps seeks to recruit even greater numbers of female volunteers, and SCORE is partnering with diverse organizations including the Veteran Business Network, National Urban League, Latino Coalition and others to attract new clients and volunteers from underrepresented communities.

Together, we will continue to work to provide the mentoring and educational services necessary to support small business owners in achieving their dreams. A sincere thanks to the U.S. Small Business Administration for its continued support, to our Board of Directors for its insight and direction, and to all our volunteers and clients for building the success that drives us forward.

With sincere appreciation,
Since SCORE’s founding in 1964, the organization has continued to grow and flourish in every direction! At SCORE, we proudly reflect on our past as we set exciting new goals for the future.

1964 SBA Administrator Eugene P. Foley officially launched SCORE as a national volunteer group with 2,000 members on October 5th, uniting independent efforts into a national force.

1964 The Small Business Act is signed into law by President Eisenhower. The U.S. Small Business Administration (SBA) was created. The law said the federal government “should aid, counsel, assist, and project the interests of small business.” Counseling small business in management practices was written into law.

1964 Over 56% were women, 31% were minorities, 12% were ever-veterans.

1996 SCORE establishes The Walter Channing Award, the highest award for volunteer service within SCORE. Named after SCORE’s founding President and President Emeritus Walter H. Channing, Channing is the first recipient.

1996 SCORE is honored for small business counseling service to 2 million Americans.

1996 SCORE begins to offer counseling via email.

1996 SCORE marks 25 years of small business service.

1996 SCORE welcomes 700th member to its online counseling team.

2000 John H. Titley of Ashland, OR bequests $250,000, which establishes The SCORE Foundation.

2001 SCORE counselors donate more than 1 million hours of service to the small business community in 2001.

2001 SCORE's workshops allowed him to start networking and get professional advice in the planning phase. Zepf notes that the help he has received has been so much more than he ever anticipated—SCORE’s workshops allowed him to start networking and get professional advice in funding and marketing. And partnering up with his SCORE mentor, Len Johnson, helped him turn his dream into a reality.

2014 SCORE celebrates 50 years and 10 mil people helped.

2014 SCORE celebrates its 30th anniversary at a White House event.

2015 SCORE’s clients for 50 years were more diverse than even. 56% were women, 31% were minorities, 12% were veterans.

2016 SCORE helped its clients to create 54,000 new businesses and add 79,000 new jobs. SCORE clients hired 86,000 independent contractors.

2016 SCORE Foundation.

2016 Zack Zeponic Farms

2016 Zeponic Farms was named Outstanding Green Business at the 2016 SCORE Awards.

2016 “As a result [of SCORE Mentoring] we were able to secure a loan for our hydroponic farm.”

2018 After graduating from college, Zepf wanted to apply his agricultural background to a new business venture. Zepf grew up with a brother who has autism and recognizes the challenges many of the 3.5 million autistics adults in the United States go through to find steady employment. In turn, he worked to build a business plan that combined his love of cultivation with a commitment to help the special-needs community.

Zepf noticed the demand for locally grown produce as the farm-to-table movement gained popularity. He decided that his venture, Zeponic Farms, could support the special-needs community by employing individuals with autism and other challenges to farm produce for the local market.

“Thanks to Len, I received information vital to launching our company. Len helped with the design phase in all of our marketing materials,” Zepf says, including the company’s logo, business cards, website, and shipping-container signage. Additionally, Zepf secured his first loan after the instruction and advice in the Grow Your Business webinar. “As a result, we were able to secure a loan for our hydroponic farm,” he says.

“Without Len’s mentorship, Zeponic Farms would still be in the planning phase,” Zepf says, crediting volunteer Len Johnson for helping Zepf overcome the steep learning curve of starting a business.

Zepf’s story has inspired countless others to help underserved populations. Through SCORE mentoring, this young entrepreneur is continuously supporting his local economy, employing special-needs members of his community, and providing fresh produce in an environmentally friendly and efficient approach. Zepf illustrates how passion and perseverance are the cornerstone for a successful company and how SCORE can provide valuable resources for every step of the way.

Zepf’s hydroponic growing method uses 95% less water than a conventional farm. Furthermore, there is little agricultural runoff into streams.

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“Our small business opportunity helped members of his community and provided fresh produce in an environmentally-friendly and efficient approach. Zepf illustrates how passion and perseverance are the cornerstone for a successful company and how SCORE can provide valuable resources for every step of the way.”

How SCORE Helped:

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Zepf and mentor Len Johnson at the 8th Annual SCORE Awards.

SCORE Award Spotlight: Zeponic Farms

CATEGORY: Outstanding Green Small Business Award
WINNER NAME AND COMPANY: Zack Zepf, Zeponic Farms
VOLUNTEER/ MENTOR: Len Johnson

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“When I first came to SCORE in August 2015, we had no location, no brand, and no sales. Since our farm opened in April 2016, we have done ~30,000 in sales and should double if not triple that next year.” – Zack Zepf

Though Zepf had an inspired idea, he had never started a business venture before and reached out to SCORE for the initial support. Zepf notes that the help he has received has been so much more than he ever anticipated—SCORE’s workshops allowed him to start networking and get professional advice in funding and marketing. And partnering up with his SCORE mentor, Len Johnson, helped him turn his dream into a reality.

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Garrett Takach, the owner of Ninja Park, is a NASM Certified Personal Trainer, Black Belt, and only 18 years old! Though Ninja Park has only just celebrated its second anniversary, Takach dreamed of owning a gym for many years. Incredibly, with the support of his family and SCORE, Takach has become a successful young entrepreneur.

Garrett's close relationship with his younger brother, who has autism, instilled a dream of helping autistic children learn to overcome obstacles in a fun, safe and supportive environment.

Takach first reached out to SCORE in 2014; Garrett and his mother, Marie, met with two mentors hoping to get feedback on Garrett's initial business plan and insight on how feasible the endeavor would be. The mentors, John and Ken, provided the Takach duo with valuable information and resources and less than a year later, Ninja Park opened.

Today, Ninja Park provides clients of all ages and fitness levels with classes, parties, and training sessions that build strength, self-confidence, and perseverance skills. Since the opening in January 2015, Marie and Garrett have had numerous meetings with their two mentors. Marie noted, “Each meeting has provided us with timely and valuable information necessary for us to maintain and grow our business in a professional manner.”

In addition to supporting the local economy and fitness enthusiasts, Ninja Park’s grand prize money will be used for the continued development of their in-house program for children with autism. “Our hope is that the lessons learned in our gym can be taken home and utilized when facing everyday life challenges,” Garrett Takach said. “Winning this Championship will give us the opportunity to buy special needs equipment, expand our children’s obstacle and party area, and offer more times to accommodate greater numbers of clients.”

Marie and Garrett are doing remarkably well in their new endeavor and will continue to build their relationship with SCORE. “Thank you, thank you! We are so excited and grateful. I am inspired by the work that SCORE does to assist people like us with the often difficult job of starting, operating, and growing a small business,” said Ninja Park co-owner, Marie Takach. Additionally, Marie noted, “I am also so grateful to Sam’s Club. Their efforts are invaluable in assisting small businesses like ours in growing so that we can help more people in our community.”
American taxpayer. The survey was administered by PricewaterhouseCoopers (PwC) and made possible by the continued generous support of Constant Contact. Data for this survey was gathered from 18,583 SCORE nationwide clients who responded to an online and phone questionnaire from October 2016 through January 2017. Survey participation is up 20% from 2015.

This year’s survey data shows SCORE client satisfaction has maintained the all-time record high from 2015: 89% of repeat survey clients and 83% of new survey clients indicated willingness to recommend SCORE to others. This is a 5% increase from five years ago. In all areas where clients provide feedback on their mentors, favorability ratings have improved corresponding with the most engaged client population: SCORE has to date. For 2016, the client engagement index score was marked at 4.09 out a 5.00 scale, it is up (+.09) since the survey was first initiated in 2012.

During FY2016, SCORE’s services kept clients in business. 96% of SCORE’s 2016 clients who were in operation for more than one year when they came to SCORE remain in business, while 88% of clients who started or acquired a business while receiving services from SCORE stayed in business. SCORE also helped to grow revenue in 64% of its small business mentoring clients.

SCORE remains the most efficient and effective business formation and job creation engine funded by the federal government. Our cost to create a job is estimated at $133.43, while the cost to create a business is just $194.35. This efficiency in creating jobs and businesses provides a tremendous return on all federal dollars invested, and, in fact, makes money for the American taxpayer.

This efficiency in creating jobs and businesses is $133 and $194 to create a business

SCORE has continued its tradition of seeking volunteer feedback by conducting its annual Volunteer Engagement Survey, administered by PricewaterCoopers (PwC). PwC once again created an Engagement Index to measure volunteer and employee engagement by asking respondents about their commitment to SCORE, along with their sense of pride, achievement and advocacy. In 2016, the survey’s response rates reached an all-time high: 65% of SCORE’s survey recipients completed the survey, up 8% since 2015 and up 17% since 2012.

For the fourth year in a row, the Engagement Index continues to rise, with Chapter Leadership showing particularly strong engagement score. In 2016, 77% of the organization was categorized as Champions highly engaged and a high intent to continue volunteering. This is an all-time high! Mentors enjoy membership in a prestigious group with a proven track record of success, and they value mentoring as a lifelong learning opportunity that allows them to give back. Volunteer engagement has improved each year since the survey was implemented.

We are proud to announce that FY2016, 33% of chapters have engagement scores of at least 4.5 (out of 5.0) which is an improvement from 2015 by over 3%.

• SCORE is a unique federal initiative that actually makes money for the Federal Government.

• We have proven that SCORE is effective and efficient: in 2016 alone, our clients returned more than $46 in new tax revenue at the federal level for every dollar appropriated to SCORE.

• SCORE remains the most efficient, effective organization to create a job, and job creation engine funded by the Federal Government. Our cost to create a job is $133 and $194 to create a business.

$1 appropriated to SCORE = $46 in new tax revenue
To select the 2016 SCORE Awards honorees, we asked our SCORE mentors to nominate successful and passionate small business owners they had worked with. We also asked our clients to nominate their businesses, share their accomplishments and explain how SCORE helped them achieve their dreams. Below are this year’s winners.

**Outstanding American Manufacturer Small Business Award presented by Sam’s Club**

Homestead Beer Co.
Granville, OH
Owner: Adam Rhodes
Mentors: Ken Williams and John Martin

"Without SCORE I don’t know that we would have been able to open. They helped us understand what the banks were going to be looking for and helped introduce us to the team that has become our banking partners."

**Outstanding Community-Impact Small Business Award presented by MassMutual**

Fit to Recover
Salt Lake City, UT
Owner: Ian Acker
Mentor: Doug McNeil

"I don’t know if we’d be here without SCORE and Doug’s consistency and push behind this project,” Acker admits. "I’m grateful for the day I walked into SCORE with a bag full of questions and confusion and walked out with a lifelong mentor and friend."

**Outstanding Diverse Small Business Award presented by AT&T**

GaBBly Bows
Columbia, SC
Owner: Rozalynn Goodwin
Mentors: John LaFond and Maxey Love

"I can’t adequately express how much of a Lifeline Midlands SCORE has been to us as a growing business."

**Outstanding Encore Entrepreneur Award presented by FranNet**

Eric & Christopher
Perkasie, PA
Owners: Eric Fausnacht and Christopher Kline
Mentors: Tim Fielder, John Small and Ken Haldeman

"Without the thought-provoking questions and guidance from SCORE counselors John Small, Tim Fielder and Ken Haldeman, we would not be where we are today."

**Outstanding Franchise Small Business Award presented by The UPS Store**

Home Helpers Home Care
South Tulsa, OK
Owner: Michele Scott
Mentors: Joseph Gagliardi and Chris Borne

"When you have a SCORE mentor, you are learning from someone who has already arrived at where I want to be. Experience is an invaluable tool (experience can’t be purchased), it can only be earned or shared."

**Outstanding Green Small Business Award presented by Kinco**

Zeponic Farms, LLC
Springfield, VA
Owner: Zach Zepf
Mentor: Len Johnson

"Without Len’s mentorship, Zeponic Farms would still be in the planning phase."

**Outstanding Innovative Small Business Award presented by Verisign**

Specs4Us
Burton, OH
Owner: Maria DellaPina
Mentors: Jon Slaybaugh and Richard Coyne

"Our mentors helped the business realize what could be holding us back in increasing revenues. They also gave us tips on how to work with the distributors we have outside of the United States and organizing our QuickBooks to be more efficient."

**Outstanding Job Creator Award presented by Intuit**

Barkly
Washington, DC
Owners: Christopher Gonzalez, Dave Comisky and Jim Camut
Mentor: Hal Shelton

"Hal is a seasoned investor and his experience on sitting on that side of the negotiating table was invaluable for our business. He helped us navigate raising our first outside capital and scale our business quickly to three markets."

**Outstanding Woman-Owned Small Business Award presented by Constant Contact**

Copiosity
Silver Spring, MD
Owners: Cynthia Clarke and Dianne Harrison
Mentor: Bruce Gitlin

"Having a SCORE representative has made a huge difference in where we started and where we’re going."

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**Outstanding Young Entrepreneur Award presented by Deluxe Corporation**

Carmel Honey Company
Carmel, CA
Owners: Jake Reisdorf, 13
Mentor: Lawrence Moran

"He’s someone who we can lean on, who we can call for advice and have a perspective from outside the business. I knew I needed help with the financial part of the business."

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Senator
Christopher Coons
Senate Small Business Champion

Congressman
Steve Chabot
House Small Business Champion

8

9
In pursuit of our goal to provide robust learning and networking opportunities to small business owners, SCORE and the SCORE Foundation partnered with sponsor Verisign to offer SCORE’s first virtual conference. The virtual conference allows individuals in different locations to participate in an online environment that has the look and feel of an in-person conference event. It combined the educational elements of a conference with the networking and interactive features of a trade show. Participants visited virtual “booths” where they collected materials, met sponsors and mentors, asked questions, and even picked up virtual swag. The first event, hosted in May 2016, helped entrepreneurs understand how to start and run and grow their business with valuable resources from SCORE, Verisign, and other partners. The second event took place in October and provided education on Cybersecurity.

May’s virtual conference attracted roughly 3,300 registrants and 1,366 unique attendees on the live day. The business attention duration was approximately four hours and over 500 attendees either visited the SCORE or the Foundation’s booth. SCORE’s 2nd virtual conference had 1,297 attendees on the live event day and 1,374 total webinar views within the first week. Attendees were able to send feedback through a post-event survey. When asked if the virtual conference helped them, 98.4% of attendees said yes (only 1 person replied no). When asked how likely they are to recommend future SCORE virtual conferences to a friend (on a scale of 1-10), the average score was 9.2.

In 2017, SCORE will be hosting two additional virtual conferences. The first event, Small Business Success Virtual Conference, will be hosted on June 8th.
Meeting our mentors
Celebrating diversity in demographics, as well as diversity of thought, SCORE looks to engage mentors from varied backgrounds. The average volunteer age has decreased (from 72 in 2012) reflecting SCORE’s increased efforts to recruit active, as well as retired entrepreneurs.

Diverse staff, too!
This increase in diversity among SCORE volunteers is reflected on SCORE’s paid staff and Board of Directors.

Meet our mentors
20.3% women
That’s up from 17% in 2015!

Diverse staff, too!
33% minority
27% women
Average Age:
67

27% minority
2016 Mentor demographics:

2016 Staff:
67% women
33% minority

2016 Board:
50% women
31% minority

Our clients: Main Street, USA:

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The American Dream Is Alive
Encouraged by these changing demographics, SCORE is going to continue to expand its reach by recruiting multi-lingual mentors, working with sponsors to provide Spanish business materials and webinars, and by encouraging our diverse cliental to become mentors themselves. We know that small businesses are the cornerstone of healthy local economies and greatly impact our nation’s financial state. We are truly excited to be a resource for those in need and to reach more minority-pop businesses than ever across the country. Additionally, SCORE has witnessed time and time again that the small business owners we work with go on to help their communities in a multitude of ways including hiring underserved populations, running “green” environmentally friendly businesses, and helping combat the wage gap!

SCORE Promotes Positive Change
Since SCORE’s founding in 1964, the organization has worked with underserved communities and has provided vital information to many small businesses who were unable to access other resources. In the last twenty years, SCORE has worked relentlessly to make sure all small business owners, especially minorities and those in underserved areas, have the resources they need to achieve their business dream.

Here at SCORE, we believe that America’s small business owners should reflect the diverse population living across the country. A 2016 Pew report shows that Americans are more racially and ethnically diverse than in the past and by 2055, the US will not have a single racial or ethnic majority. According to the report, nearly 59 million immigrants have arrived in the US in the last fifty years, mostly from Latin America and Asia. Additionally, the traditional family structure is changing and the US has more single-family and single-income homes than ever before. SCORE believes that this historic change is partially responsible for the tremendous growth in female created and run small businesses. In fact, in 2016, 56% of SCORE clients were women!

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A SCORE PROFILE: People Making A Difference

THE ALLIANCE FOR POSITIVE CHANGE

Mission:
The Alliance is a multiservice community organization that carries out its mission of “helping many, one by one” by building community connection and stability for New Yorkers living with and at risk for HIV/AIDS. The Alliance’s comprehensive programs include state-of-the-art peer education and training, harm reduction, specialized women’s services, HIV counseling and testing, mental health services, medical and holistic care, case management, support groups, and many other innovative programs that help New York City’s most vulnerable individuals and families to survive and thrive in the face of HIV/AIDS.

Where it all Began:
In 1990, Sharen Duke launched Aids Service Center NYC (ASCNYC). With the help of the Design Industry’s Foundation for AIDS (DIFFA) who donated an office space and the AIDS Institute who provided a grant, Sharen along with her staff of three and budget of $170,000, began their mission to improve the lives of those infected with the AIDS virus.

The Alliance for Positive Change (previously AIDS Service Center NYC) helps New Yorkers make lasting positive changes towards health, housing, recovery and self-sufficiency. The organization offers a diverse range of individualized, professional services in a nurturing environment; this includes innovative peer education, access to healthcare, harm reduction and social services. The Alliance’s programs promote positive change, self-respect, personal responsibility and connection to community. All services are free, confidential, offered in English, Spanish, French and Haitian Creole, and available at community centers across New York City.

The Alliance for Positive Change was recognized by SCORE as the 2014 Outstanding Non-Profit Organization.

Learn more: alliance.nyc

Mental Health Counseling. And More.

“It’s amazing to look around at this agency and see so many people doing such wonderful things with their lives, and giving so much back to the community. They are my heroes, and my inspiration for doing this work.”

Sharen Duke, CEO
The Alliance for Positive Change

How SCORE Helped:
In 2008, the recession presented Sharen Duke with new, unfamiliar challenges. Sharen reached out to SCORE to help her in an area she had not been trained in, finance. Sharen’s mentor, Munir Saltoun worked with Sharen and The Alliance’s CFO to create a five year plan to restructure the organization in order to get it back on financial track.

Since 2008, The Alliance has continued to grow into a vibrant and successful organization. Today, The Alliance has more than 115 staff members, 90 peer educators, and a budget of nearly $10.8 million. The organization has provided care to more than 5,100 clients at our five sites last year and another 17,100 people are reached through our peer education and community outreach initiatives.

Sharen Duke,
CEO
The Alliance for Positive Change

“It’s like a safe haven for me; I feel safe, I feel loved.” – ASC Member

“It’s like a safe haven for me; I feel safe, I feel loved.” – ASC Member

2016 impact

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<th>HIV Tests (Annually)</th>
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<th>Hot Meals (Annually)</th>
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2016 Impact

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90 peer training groups (annually)
2,500 HIV tests (annually)
5,500 New Yorkers connected to medical care
18,000 hot meals (annually)
SCORE is a nonprofit organization and a resource partner of the U.S. Small Business Administration (SBA). Headquartered in Herndon, VA with a staff of 22 people, SCORE has more than 10,000 volunteers in over 300 chapters across the nation.

For many SCORE chapter locations, office space is generously donated by SBA district offices, Chambers of Commerce and other community supporters. In FY2016, SCORE received a federal grant of $10.7 million via the SBA, which provides the primary financial support for SCORE’s operations. SCORE generated nearly $4.5 million additional revenue from chapter operations. The SCORE Association thanks the generous individuals and organizations that have helped small businesses across the country with their support.

FY16 SCORE Association Financial Report

Supporting SCORE’s Mission to Support Small Business Success

FY16 SCORE Association Statement of Financial Position  
Year ended Sept. 30

<table>
<thead>
<tr>
<th>Assets</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$9,455,160</td>
<td>$8,725,602</td>
</tr>
<tr>
<td>Receivables and Prepaid Expenses</td>
<td>340,201</td>
<td>481,218</td>
</tr>
<tr>
<td>Fixed Assets</td>
<td>-</td>
<td>55,594</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$9,785,361</strong></td>
<td><strong>$9,262,414</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable and Accrued Expenses</td>
<td>$1,156,174</td>
<td>$848,972</td>
</tr>
<tr>
<td>Accrued Vacation and Payroll</td>
<td>209,468</td>
<td>154,169</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$1,365,642</strong></td>
<td><strong>$1,003,141</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$8,419,719</strong></td>
<td><strong>$8,259,273</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter Expense</td>
<td>$4,265,387</td>
<td>-</td>
</tr>
<tr>
<td>Donated Office Space, Goods and Services</td>
<td>$3,246,425</td>
<td>-</td>
</tr>
<tr>
<td>Volunteer – Chapter Services and Travel</td>
<td>$2,560,806</td>
<td>$2,560,806</td>
</tr>
<tr>
<td>Salaries and Fringe Benefits</td>
<td>$2,311,429</td>
<td>-</td>
</tr>
<tr>
<td>Technology and Website</td>
<td>$1,404,806</td>
<td>$1,404,806</td>
</tr>
<tr>
<td>Chapter Clerical Support</td>
<td>$919,207</td>
<td>$919,207</td>
</tr>
<tr>
<td>National Leadership Conference</td>
<td>$834,149</td>
<td>$834,149</td>
</tr>
<tr>
<td>Marketing</td>
<td>$635,234</td>
<td>$635,234</td>
</tr>
<tr>
<td>Professional Services</td>
<td>$607,732</td>
<td>-</td>
</tr>
<tr>
<td>Communications and Publications</td>
<td>$202,288</td>
<td>$202,288</td>
</tr>
<tr>
<td>Office Supplies, Postage and Equipment</td>
<td>$114,214</td>
<td>-</td>
</tr>
<tr>
<td>Amortization</td>
<td>$100,068</td>
<td>-</td>
</tr>
<tr>
<td>Board of Directors</td>
<td>$99,534</td>
<td>-</td>
</tr>
<tr>
<td>Other</td>
<td>$55,594</td>
<td>-</td>
</tr>
<tr>
<td>Insurance</td>
<td>$24,914</td>
<td>-</td>
</tr>
<tr>
<td>Sandy Relief Program</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Boots to Business</td>
<td>$290,509</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$17,672,496</strong></td>
<td><strong>$15,576,820</strong></td>
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<table>
<thead>
<tr>
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| FY16 SCORE Association Revenues, Expenses and Net Assets  
Year ended Sept. 30 | 2016 | 2015 |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue, Support and Other Changes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant - U.S. Small Business Administration</td>
<td>$10,790,509</td>
<td>-</td>
</tr>
<tr>
<td>Chapter Program Revenue</td>
<td>928,164</td>
<td>1,827,716</td>
</tr>
<tr>
<td>Gifts and Grants</td>
<td>1,706,172</td>
<td>-</td>
</tr>
<tr>
<td>Donated Office Space, Goods and Services</td>
<td>2,560,806</td>
<td>-</td>
</tr>
<tr>
<td>Other</td>
<td>19,175</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>16,005,226</td>
<td>17,832,942</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets Released from Restrictions</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfaction of Restrictions</td>
<td>3,551,865</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Revenue and Other Support</strong></td>
<td>19,557,091</td>
<td>17,832,942</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
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<td>$8,259,273</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets - Beginning of Year</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>$4,858,880</td>
<td>$3,400,293</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Net Assets - End of Year</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>$6,743,375</td>
<td>$6,819,719</td>
<td>$8,259,273</td>
</tr>
</tbody>
</table>
The SCORE Foundation is the philanthropic arm of SCORE. The SCORE Foundation raises funds to extend the reach of SCORE’s mentoring and training across the country. During FY2016, more than $4.3 million was raised by the Foundation to support SCORE programs.

Over the past year, the Foundation provided chapter-level grants to help chapters grow their marketing and seminar programs, provided full funding for the client and volunteer surveys, underwrote the new SLATE 2.0 mentor training and education platform, and managed funds for 25 chapters in three districts.

The SCORE Foundation would like to recognize and thank each corporate partner and individual that has invested in SCORE’s capacity to serve small business owners this year.

FY16 The SCORE Foundation Revenues, Expenses and Net Assets – Year ended Sept. 30

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Restricted</th>
<th>2016 Totals</th>
<th>2015 Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue, Support and Other Changes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>1,170,533</td>
<td>3,093,660</td>
<td>4,264,193</td>
<td>2,510,038</td>
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<tr>
<td>Events and Special Projects</td>
<td>106,500</td>
<td>-</td>
<td>106,500</td>
<td>156,689</td>
</tr>
<tr>
<td>Interest and Dividends</td>
<td>11,290</td>
<td>-</td>
<td>11,290</td>
<td>7,005</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>1,288,323</td>
<td>3,093,660</td>
<td>4,381,983</td>
<td>2,673,762</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>1,884,534</td>
<td>(-1,884,534)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total Revenue and Other Support</td>
<td>3,172,857</td>
<td>1,209,126</td>
<td>4,381,983</td>
<td>2,673,762</td>
</tr>
</tbody>
</table>

Expenses

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SCORE Program Support</td>
<td>1,438,806</td>
<td>-</td>
<td>1,438,806</td>
<td>1,308,659</td>
</tr>
<tr>
<td>Other Program Support</td>
<td>959,040</td>
<td>-</td>
<td>959,040</td>
<td>-</td>
</tr>
<tr>
<td>Grants to SCORE</td>
<td>141,132</td>
<td>-</td>
<td>141,132</td>
<td>1,789</td>
</tr>
<tr>
<td>Salaries and Benefits</td>
<td>930,293</td>
<td>-</td>
<td>930,293</td>
<td>810,502</td>
</tr>
<tr>
<td>Special Events</td>
<td>128,657</td>
<td>-</td>
<td>128,657</td>
<td>136,788</td>
</tr>
<tr>
<td>Government Relations</td>
<td>121,810</td>
<td>-</td>
<td>121,810</td>
<td>119,270</td>
</tr>
<tr>
<td>Professional Fees</td>
<td>92,747</td>
<td>-</td>
<td>92,747</td>
<td>103,293</td>
</tr>
<tr>
<td>Licenses and Software</td>
<td>17,043</td>
<td>-</td>
<td>17,043</td>
<td>26,422</td>
</tr>
<tr>
<td>Travel and Registration</td>
<td>71,080</td>
<td>-</td>
<td>71,080</td>
<td>75,308</td>
</tr>
<tr>
<td>Donor Recognition, Bank Fees</td>
<td>20,475</td>
<td>-</td>
<td>20,475</td>
<td>18,220</td>
</tr>
<tr>
<td>Printing and Supplies</td>
<td>8,892</td>
<td>-</td>
<td>8,892</td>
<td>17,650</td>
</tr>
<tr>
<td>Insurance and Prospect Research</td>
<td>6,233</td>
<td>-</td>
<td>6,233</td>
<td>6,189</td>
</tr>
<tr>
<td>Bad Debt Expense</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>23,270</td>
</tr>
<tr>
<td>Telephone and Postage</td>
<td>12,386</td>
<td>-</td>
<td>12,386</td>
<td>9,459</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>3,948,594</td>
<td>-</td>
<td>3,948,594</td>
<td>2,656,889</td>
</tr>
</tbody>
</table>

Change in Net Assets

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Assets - Beginning of Year</td>
<td>1,366,033</td>
<td>1,903,975</td>
<td>3,270,008</td>
<td>3,253,135</td>
</tr>
</tbody>
</table>

Net Assets - End of Year

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$3,703,197</td>
<td>3,270,008</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Robert Bard is the president and CEO of LATINA Style Inc., a company that produces LATINA Style Magazine, a publication for professional and community leaders of Latina heritage. He was involved in the design and development of the magazine and he serves on the LATINA Style Magazine, Inc. Advisory Board. In 2005, he was the co-founder of Privata, a consulting firm serving corporations and NGOs on issues related to the Latin American market.

Joyce M. Brayboy is Vice President, Goldman Sachs Office of Government Affairs in the Washington, DC office. She joined Goldman Sachs in 2001 and currently serves as a member of the Board of Directors of the Community Foundation for Greater Washington and the National Board of Advisors for the Howard University College of Medicine. She received a B.A. in political science from Howard University and a J.D. from George Washington University Law School. She is a member of the District of Columbia and the U.S. Court of Appeals for the District of Columbia circuits. Additionally, in 2002, she was recognized by the Business Journal as an East Coast Power Player. She is a member of the Board of Directors of the National Urban League and is a member of the National Press Club. She is a member of the Board of Directors of the National Urban League.

John Caldwell is a Senior Manager at North American Membership Group. As a Senior Manager at North American Membership Group, he develops and leads teams in supporting internal clients and external clients. He has over 15 years of experience in the healthcare industry and has been involved in a variety of projects, including the development of a new product line, the implementation of a new technology, and the expansion of a sales team. He has a Bachelor of Business Administration from the University of North Carolina at Chapel Hill. He is a member of the American Management Association and the SCORE National Advisory Board.

Larry Tucker is the Senior Vice President of Marketing and Communications for visi.com, a full-service subsidiary of UPS that provides print and small business solutions to small and medium-sized businesses. He is also the CEO/CTO of ARkival Technology Corporation, a company that provides small businesses with a cost-effective, scalable, and secure solution for storing and managing their important data. Tucker has over 20 years of experience in technology and has held senior executive positions in companies such as IBM, Microsoft, and HP. He is a member of the Board of Directors of the SCORE Foundation and is a past recipient of the SCORE's Special Recognition for Highest Achievement Award. He is also the Senior Vice President of Marketing and Communications for visi.com, a full-service subsidiary of UPS that provides print and small business solutions to small and medium-sized businesses. He is also the CEO/CTO of ARkival Technology Corporation, a company that provides small businesses with a cost-effective, scalable, and secure solution for storing and managing their important data. Tucker has over 20 years of experience in technology and has held senior executive positions in companies such as IBM, Microsoft, and HP. He is a member of the Board of Directors of the SCORE Foundation and is a past recipient of the SCORE's Special Recognition for Highest Achievement Award.

Michelle Van Slyke is the Senior Vice President of Marketing and Communications for visi.com, a full-service subsidiary of UPS that provides print and small business solutions to small and medium-sized businesses. She is also the CEO/CTO of ARkival Technology Corporation, a company that provides small businesses with a cost-effective, scalable, and secure solution for storing and managing their important data. Tucker has over 20 years of experience in technology and has held senior executive positions in companies such as IBM, Microsoft, and HP. He is a member of the Board of Directors of the SCORE Foundation and is a past recipient of the SCORE's Special Recognition for Highest Achievement Award. She is also the Senior Vice President of Marketing and Communications for visi.com, a full-service subsidiary of UPS that provides print and small business solutions to small and medium-sized businesses. She is also the CEO/CTO of ARkival Technology Corporation, a company that provides small businesses with a cost-effective, scalable, and secure solution for storing and managing their important data. Tucker has over 20 years of experience in technology and has held senior executive positions in companies such as IBM, Microsoft, and HP. He is a member of the Board of Directors of the SCORE Foundation and is a past recipient of the SCORE's Special Recognition for Highest Achievement Award.

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Generous Donors Support Entrepreneurship & SCORE Mentoring

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Corporate donors who contributed $50,000 or more to the SCORE Foundation
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ComplyRight
Constant Contact
Epsilon Data Management, LLC
Ewing Marion Kauffman Foundation
Hiscox Insurance
Kimco Realty
Liberty Tax Service
MasP Mutual
On Deck Capital
Paychex
Staples
The Deluxe Corporation Foundation
The UPS Store
Union Bank
UPS Foundation Inc.
Verisign
Wal-Mart Foundation/Sam’s Club

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Bangor Savings Bank
Berkshire Bank
Brown & Brown Inc.
Comerica Bank
Connect Public Relations, Inc
Eastern Bank
Ernst & Young LLP
Faulkner
Fox Community Credit Union
Intel Volunteer Grant Program
Intuit
Kabbage
Legacy Texas
Middlesex Savings Bank
New Economy Initiative
NFPA
Richmond County Savings Foundation
The Deluxe Corporation
Wells Fargo Bank
Wells Fargo Foundation
YP
ZenPayroll DBA Gusto

Honor Roll Individual donors who contribute $1000 or more to the SCORE Foundation

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John Campbell
Gail Goodman and David Swindell

Gold Level
JoVita Carranza
Frederick Claye
Mr. and Mrs. Hal Shelton
Larry Tucker

Silver Level
John K. Andall
David R. Bobbitt
Jacques and Audrey Bonneau
Sally Iroff

Joe Clarke
Edie Fraser
John Fuqua
Mr. & Mrs. Gerard L. Glenn
The Grace Foundation
Douglas Hammond
The Jackson Family Donor Advised Fund of Waccamaw Community Foundation
Chana Kohn
Rayminta E. Mehta
Mike Mendez
Becca Niel
Sue Ellen Oberg
George E Olbrien
Lawrence Polka

Richard N. Priest
Laura Radek
Richard Reifer
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Mr. & Mrs. Mark D. Rothenberg
Charles A. Sawicki
Alan Simon
Leland Smithson
John Grant Small
Nigel Stephens
Nancy Stroyn
Marge Taylor
Kristine Gabel Trust
Ronald D. Weiss
Gerald Wroblewski

SCORE is grateful to each and every donor. If your name has been inadvertently missed or you wish to learn more about donating to support SCORE, please contact Resa Kierstein at 703.593.3634.

Social Media Expansion
SCORE knows that it is important to be where your clients are – and this is one of the reasons why social media is so important. We also want our mentors to be able to focus on the mentoring and education for their clients. Therefore, SCORE tested providing social media marketing for 10 chapters in FY2016. The purpose was to manage these chapters’ online presence, branding, and engagement on Facebook, Twitter, LinkedIn, and Google+. After six months of the initial pilot, the results were very positive making the case for a second phase and expanding the program to 100 chapters. In 2017, SCORE will create customized local marketing strategies for each chapter, prioritizes local content, and cross markets across all channels to improve SCORE’s social media following both locally and nationally.

Data Report
In honor of National Small Business Week, SCORE will issue its inaugural data report of a series entitled: The Megaphone of Main Street: Report on America’s Small Businesses. Drawing its data from SCORE’s large, diverse population of clients, this data report will go beyond the small business data reported in the U.S. Census to provide new details on pre-start businesses, entrepreneurial sentiment, and, most significantly, the impact of solopreneurs, start-ups and microbusinesses on job creation. In presenting this new information, the report series will fill a gap in the existing research and contribute to a more accurate understanding of the true state of today’s Main Street, USA.

National Call Center Program
Piloted in June 2016 with 10 Alpha Chapters, the National Call Center Program now has 49 enrolled Chapters across SCORE and growing! For each enrolled Chapter, the National Call Center provides immediate contact to clients that submit mentoring requests online. The representatives thank each client for choosing to work with SCORE and they gather additional, helpful information to help pair clients with their SCORE mentor. Through this program, the Call Center strives to increase client conversion rates and drive client engagement while decreasing the administrative burden on our Volunteers.