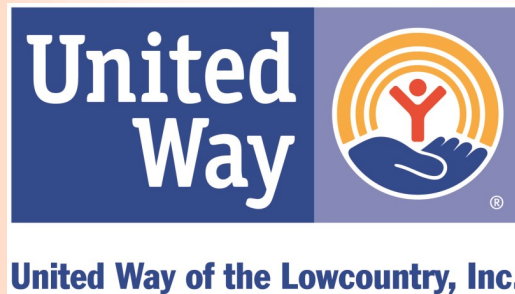


2013 Annual Report



United Way of the Lowcountry, Inc.
2266 Boundary Street, Beaufort, SC 29902
www.uwlowcountry.org

LIVE UNITED

GIVE. ADVOCATE. VOLUNTEER.

When a United Way annual campaign kicks off, the main goal is to secure funding for our programs. In 2013, these programs—whether one of our partner agencies, our Early Grade Reading Program, or our Helpline, we helped over 31,000 people in the lowcountry improve their situations.

Progress is constantly moving toward a destination, and in the last year we were able to take progressive steps in improving the health, education, income and basic needs of our community. We helped fund over 40 programs and 33 partner agencies. In addition, we saw over 2400 people come in or call for help, and we aimed for positive outcomes with all of them.

Our Early Grade Reading program saw enormous success in its first year. With the help of nearly 200 volunteer tutors we enrolled over 150 students in eight local schools in our program. Of these students, 97% in Beaufort County and 98% in Jasper County improved their MAP test scores in reading—an incredible success rate we look to duplicate next year!

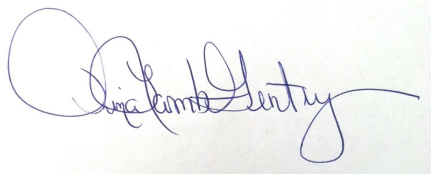
Only the businesses and individuals of Beaufort and Jasper Counties who recognized the United Way as a positive solution to many problems in these areas of focus made it possible for us to take these steps. Our donors and volunteers should feel fully staked in this successful journey.

On behalf of the child who learns to read, the homebound person who receives a daily meal, the abuse victim who finds safe shelter and others directly affected by your participation in our organization's efforts, thank you.



Chris McCorkendale

2013-2014 Board Chairman



Tina Gentry

President & CEO



2013 Annual Report

OUR MISSION

To mobilize resources to solve human problems.

OUR VISION

To be the leading force for social change to improve basic needs, education, health and financial stability outcomes for the citizens of Beaufort and Jasper County.

LIVE UNITED®



COMMUNITY INVESTMENT

Investing in programs and agencies

The monumental task of reviewing partner agency funding applications—a staple of United Way services—was completed in 2013 with the help of over 50 local volunteers.

As always, these volunteers dug deep into the applications of our partner agencies; reviewing outcomes, financial records and participating in site visits to the agency offices. Becoming a partner agency of United Way of the Lowcountry is rigorous and many of our long-time agencies can attest to the high standards we enforce.

These dedicated volunteers came together to advance the common good—a goal of every facet of the United Way.

Because we are focused on outcomes, we are able to clearly demonstrate success within programs, and all of our partner agencies run programs that work for the better of those in need in our community.

Community Investment Panel

Richard McLean

Community Investment Chairman

Bruce Doneff

Community Investment Vice-Chairman

Steve Hoover, Panel Chair

Bob Norwood, Panel Chair

Maggie Blank, Panel Chair

Kimberly Krivda, Panel Chair

Barbara Pawlishyn, Panel Chair

J.T. Kline, Panel Chair

April Ford, Panel Chair

Nikki Biskobing, Panel Chair

COMMUNITY INVESTMENT



Agencies—the heart of the matter

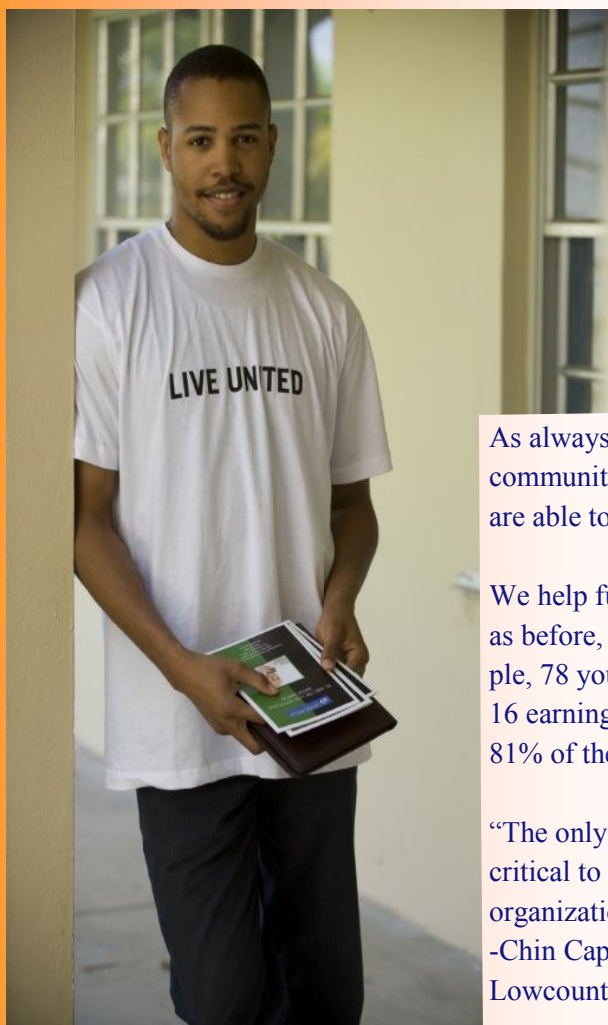
As always, we remain an agency that is fully incorporated in our community. Through funding programs in our partner agencies, we are able to address needs in a multitude of areas of concern.

We help fund over 40 programs and 33 agencies, and this past year, as before, several of our agencies had successful results. For example, 78 young men at AMIKids advanced in their core classes, with 16 earning GED's. Friends of Caroline Hospice was able to keep 81% of their patients in home or in facilities.

"The only way we're able to continue these programs that are so critical to our community is through the funding and support of organizations like the United Way of the Lowcountry," said Shaww-Chin Capps, Executive Director of Hope Haven of the Lowcountry.

When you donate to the United Way, you are helping improve the lives of *so many* people in *so many* areas.

"The funding that the Wardle Family YMCA receives annually from the United Way is undoubtedly one of the most vital gifts we receive," stated CEO Michael Bostwick. "This support we receive from the United Way ensures that we can continue to offer high quality, affordable programs to the Beaufort and Jasper communities that build healthy spirit, mind and body for all. The number of families who benefit from the United Way support continues to grow annually and we could not be more thankful for the assistance."



In 2012, the Board of Directors of the United Way of the Lowcountry made the decision to become an impact agency by developing and implementing the Early Grade Reading Program.

The goal when we started the program was to have 80 percent of students in Beaufort and Jasper County schools reading on grade level by the time they enter fourth grade.



The early results from our first year employing the program show tremendous success.

We had nearly 200 volunteer tutors work in the program with over 150 students in eight local schools enrolled. A full 97% of students in six Beaufort County schools and 98% of students in Jasper County schools improved their MAP reading test scores during the course of the year!

For the 2013-2014 school year, we have once again enrolled nearly 200 students in 1st through 3rd grade and have recruited, trained and deployed roughly 200 volunteer tutors.

In addition to these tutors we have added AmeriCorps members who, through a 3-year grant cycle, will serve as lead tutors for the next three years!

EDUCATION



Early Grade Reading

Education Impact Committee

Major James Chisolm

Dr. Renarta Tompkins

Dr. La'Toya Thomas-Dixon

Pat Ash

Mary Ellen Parks

Scott Strawn

Ashley Hutchison

Phyllis Doyle

Kathy Folsom

Susan Gordon

Carmen Dillard





AMERICORPS

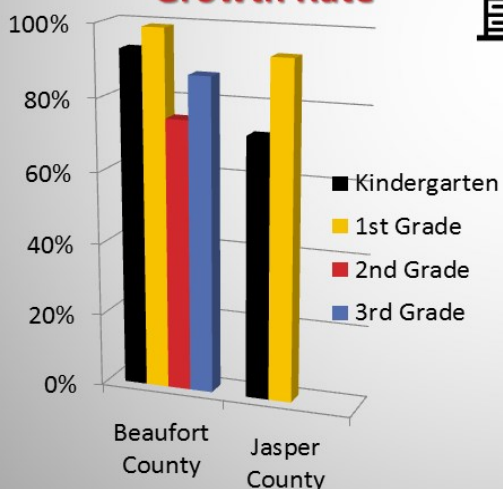
Early Grade Reading Program

142 Students received
one-on-one tutoring in
8 schools throughout
Beaufort and Jasper counties.



68 Kindergarteners
46 First Graders
12 Second Graders
16 Third Graders

Fall 2012 to Spring 2013 Growth Rate



A History of Leveraging Resources to Achieve our Goals

2012

- United Way of the Lowcountry
- Beaufort & Jasper County School Districts
- University of South Carolina-Beaufort

2012-2013

- United Way of the Lowcountry
- Beaufort & Jasper County School Districts
- University of South Carolina-Beaufort
- Public/Private Partnerships & Foundations

2013-2014

- United Way of the Lowcountry
- Beaufort & Jasper County School Districts
- University of South Carolina-Beaufort
- Public/Private Partnerships & Foundations
- CNCS/AmeriCorps

GIVE. ADVOCATE. VOLUNTEER.
LIVE UNITED
United Way of the Lowcountry, Inc.





HELPLINE

Advocacy. Referrals. Assistance.

1,444 calls
423 walk-ins
In 2013

As a phone number to call or a place to walk in for help, our Helpline exists to refer those in need to our partner agencies, advocate and coordinate services among agencies, and in cases where services are not provided elsewhere, provide them ourselves.

For example, a single father came to us for help with his mortgage payment. He'd never been in before - here or anywhere - asking for help. Raising three girls in a house he owns on St. Helena, he'd gotten behind on the mortgage because his work at an event rental company had slowed to a crawl. We were able to provide the help he needed to get back on his feet, and we were happy to hear back from him a month later telling us his situation had stabilized.

In another case, we received an early morning phone call from the Beaufort County Sheriff's office seeking help for a woman and her children escaping domestic violence. We led the efforts to get this family help by coordinating three of our partner agencies and one local church.

We hear from time to time, when we inquire, why people come to us first.

"Because I saw the sign and knew it meant help."

With your engagement, we will continue to be the leading agent for those who seek the safety of our sign.



WOMEN'S LEADERSHIP COUNCIL

WLC Steering Committee

Katie Phifer, Co-Chair

Sandra Chavez, Co-Chair

Gloria Duryea

Kathy Folsom

Jody Hayward

Kathleen Jordan

Donna Klein

Amy Pinckney

Ashley Rhodes

Daisy White

Inspiring, educating, encouraging

The Women's Leadership Council, founded in 2012, is dedicated to inspiring, educating, encouraging and recognizing women as agents of change in our community through philanthropy, leadership and service.

Across the country, WLC's are recruiting and training women in the community to address needs in education.

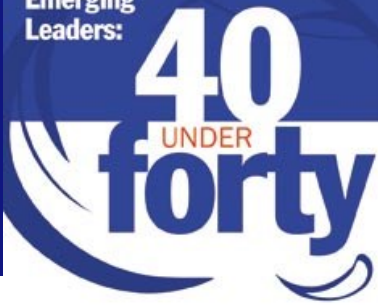
In addition, our chapter held a series of community conversations aimed at informing and engaging the public in discussions about local education. One of these community conversations even featured the 2013 South Carolina State Superintendent of the year, Clarendon County's Dr. Rose Wilder.

The Women's Leadership Council also organized the first Power of the Purse, a special event aimed at raising money for a fund that helps address needs that are hindrances to education and are issues not addressed by other funding.

The power to change our community is in our hands. Join us and build on the power of women to create opportunities for all children to have better futures!



United Way of the Lowcountry
Emerging
Leaders:



EMERGING LEADERS

2013 was another great year for the Emerging Leaders program, led by co-chairs Courtney Hampson and Matthew Brady.

Begun in 2012 as a way to connect the under-40 crowd with information on local issues and opportunities to serve as volunteers with partner agencies and on United Way committees.

Events this year included hearing about Hope Haven at Saltus River Grill, hearing about the Boys and Girls Club of Bluffton at The Dispensary and bringing toys to a drive at Michael Anthony's in Hilton Head at Christmas.

The Emerging Leaders program is looking to expand in 2014, so for more information please call 982-3040.



15TH ANNUAL HEART CAMP



This year, the work camp was held the week of June 23rd through June 29th. 380 high school students, along with 100 adult leaders and Catholic HEART camp staff stayed at the Hardeeville School Complex. These volunteers gave up one week of their summer vacation to perform simple home repairs for local residents in need~ right here in the lowcountry.

Several local volunteers and retired contractors also helped with many of the work projects. In total repairs were done on 53 homes along with groups working at 5 United Way partner agencies; The Boys and Girls Club in Bluffton, The Children's Center – Bluffton and Hilton Head, United Way Ridgeland office and Friends of Caroline Hospice.

Seven homes in Bluffton, eight homes in Hardeeville, 13 homes in Ridgeland, 15 homes on St Helena Island and 10 homes in Beaufort were serviced. Five ramps were built along with steps, porches, floor and wall repair, trash cleanup and painting. All of the paint was donated by Glidden Paint, as it has been for the past 15 years. The week was once again spectacular and gained lots of interest in the community. The Catholic HEART Work Camp will partner again with United Way of the Lowcountry in 2014.

VOLUNTEER CENTER

Get Connected remains the online one-stop connection for agencies and volunteers who are looking for opportunities to work together.

Introduced in late spring 2012, *Get Connected* features volunteer listings from Beaufort and Jasper County agencies. It is one of the most frequently used features on our website. It's just one more way United Way of the Lowcountry is reaching out – and getting connected with – the volunteers who make such a difference.

Volunteers selflessly gave hundreds of hours of their time to make our community a better place. The Volunteer Center matches interests and skills of the individual with needs in the community. It provides visiting groups from across the nation with opportunities to improve lives. Volunteer time is a gracious donation in itself, and it is United Way's privilege to work with such a dedicated group of people.

GET CONNECTED
Powered by Galaxy Digital

ONLINE DIRECTORY

A partnership between United Way of the Lowcountry, the Beaufort County Human Services Alliance, Palmetto Breeze and the USCB Human Services Program continues to update the regional Human Services Directory - available online at www.uwlowcountry.org.

Formerly a printed directory, with an online version the public can access this invaluable resource that direct service providers have grown to depend upon. To make information retrieval as easy as possible, all resources are categorized by the type of services provided and can be queried by the need of the individual or by the agency or program name.

As mentioned, you may access the resource guide on the United Way website. USCB's Human Services program will have interns update the guide every spring semester as an annual signature service project.



BOARD OF DIRECTORS

Christopher McCorkendale, Chairman

J. Ashley Twombly, Vice-Chairman

Meredith Keene, Treasurer

Matthew Brady

Major, USAF (Rtd.) James Chisolm

Phyllis Doyle

Courtney Hampson

Craig Harney

Bryan Hill

Bernie Kole

Dr. Randy Lamkin

James McCornock

Richard McLean

Mark O'Neil, Jr.

Kathleen Oelschlager

Michael Petrilli

Katie Phifer

Peter Post

Colonel, USMC (Rtd.) Jack Snider

Brad Talbert

Dr. Renarta Tompkins

LIVE UNITED



www.uwlowcountry.org

JASPER COUNTY

Jasper Advisory Committee

Bonnie Bennett

Beth Gregorie

Marianne Hawkins

George Hood

Rev. Thomas McClary

Justin Rhodes

Alexina Strozier

Dr. Vashti Washington

2013 was another banner year for our Jasper County office, which included inviting board members and community members for a tour of the Jasper County Board of Disabilities followed by a lunch at Jasper's Porch restaurant in Ridgeland.

Jasper County Advisory Committee members also helped recruit and retain volunteers for the Early Grade Reading Program present in two Jasper County Schools as well as enabled the office to continue its presence as a source of help in the community.





United Way of the Lowcountry continued its partnership with Together For Beaufort to offer free tax preparation through the Lowcountry Area VITA Coalition. This effort targeted outreach to working families to work with volunteers trained to help them apply for Earned Income Tax Credits.

Lowcountry Area VITA Coalition volunteers, trained by the IRS, assists working families in completing their tax forms. The IRS estimated a total economic impact on our community in excess of three million.

Taxpayers who received tax preparation services through our VITA program also received information and referral to: Beaufort County Department of Social Services Family Independence and Supplemental Nutrition Assistance Programs, Palmetto Breeze Transportation, Beaufort County Department of Emergency & Disaster Preparedness, Citizens Opposed to Domestic Abuse, Lowcountry Habitat for Humanity, First Citizens Bank, Angel Food, and other organizations.

The VITA (Volunteer Income Tax Assistance) program intends to prepare over 2,500 tax returns in 2014 for local working individuals and families in the Lowcountry. The VITA program returns nearly \$3.2 million dollars back into the pockets of our residents and saves over \$400,000 in tax preparation fees.



CORPORATE AND INDIVIDUAL SPONSORS

BB&T

Coleman Creative Design Studio

Itech

Garden Gate Nursery

Hampton Lakes

Kathleen and Jim Jordan

Carecore National

Dan McCormick

Dividend Assets Capital, LLC

Dr. and Mrs. Joseph Glas

Forsythe Jewelers

Hand and Tanner Financial

Hargray Communication Group

Hilton Head Hospital

Jasper's Porch

Karen Taylor Good

Malcolm Goodridge

Mike and Beverly Petrilli

Mr. and Mrs. Charlie Francis

Mr. and Mrs. James McCornock

Mr. and Mrs. Peter Post

OC Welch Ford Lincoln

Oldfield Plantation

Palmetto Bluff

Publix Super Markets

Regions

South Carolina Bank & Trust

SCE&G

Secession Golf Club

South Carolina Electric & Gas

The Lane Construction Corporation

The Rotary Club of the Lowcountry



PACESETTERS

Alzheimer's Family Services
 American Red Cross
 AMIKids
 Atlantic Community Bank
 B/J/H Comprehensive Health
 Bank of Walterboro
 Bay Street Outfitters
 BB&T
 Beaufort County Association
 of Realtors
 Beaufort Jasper Water
 & Sewer Authority
 Beaufort Oil Company, Inc.
 Beaufort Regional Chamber
 of Commerce
 Bennett Law Firm, PA
 Bitty's Flower Shop
 Blossom's on Main
 Bluffton Self Help
 BNC Bank
 Born to Read
 Boys & Girls Club of the Lowcountry
 Bundy Appraisal & Management
 CareCore National, LLC
 Carolina Air, Inc.
 CBC National Bank
 Chamber of Commerce - Hilton Head
 Island/Bluffton
 Charter I Realty & Marketing
 Child Abuse Prevention Association

Citizens Opposed to Domestic Abuse
 Classic Consignments, Inc.
 Coldwell Banker Platinum Partners
 Collins Pest Control, LLC
 Consumer Credit Counseling
 D & R Auto Brokers
 D & S Heating & Cooling, Inc.
 Deals Clothing of Beaufort
 Deep Well Project
 Disney's Hilton Head Resort
 Distinctive Designs in Cabinetry
 Dividend Growth Advisors
 Dr. and Mrs. William O'Brien
 El Ranchito Restaurant
 Espy Lumber Company, Inc.
 Exit Realty of Beaufort
 First Citizens Bank
 Forsythe Jewelers
 Friends of Caroline Hospice
 GE Foundation
 GJ's Cars Inc.
 H&H Furniture
 Hand & Tanner Financial Group
 Harry C. Brown, Sr. Law Firm
 Harvey's Barber Shop
 Hometown Realty
 Hope Haven of the Lowcountry
 Island Realty
 Jasper County Chamber
 of Commerce

PACESETTERS

Jasper County Council on Aging

Jasper Feed and Seed

June & Associates, PA

Kinghorn Insurance-Beaufort

Kole Construction

Kroger

Literacy Club of the Lowcountry

Lowcountry Bicycles

Lowcountry Habitat for Humanity

Lowcountry Legal Volunteers

Lowcountry Real Estate

Lulu Burgess

Merrill Lynch

Modern Jewelers

Mr. and Mrs. Gregory Ridler

Murr's Printing

Nationwide Insurance

Nationwide Insurance

NBSC a Division of Synovus Bank

O.C. Welch

Ocean Light Corporation

Oyster Cay Collection

Palmetto Electric Cooperative

Palmetto State Bank

Peters, Murdaugh, Parker, Eltzroth & Detrick

Publix Super Markets

Re/Max Sea Island Realty

Real Estate Professionals

Regions Bank

Republic Waste Services

Robert's Village Jewelers

Robinson & Grant PA

Rotary Club of the Lowcountry

Secession Golf Club

Second Helpings

Senior Services of Beaufort Co.

South Carolina Bank and Trust

South Carolina Electric & Gas Co.

Southern Tree Services

SunTrust Bank

Sutcliffe Golf Cars

Target

TD Bank

The Homes Finder Realty Group

The Lane Construction Corporation

Thumbs Up

Tideland Realty, Inc.

Town of Port Royal

Tupper, Grimsley & Dean, PA

United Parcel Service

United Way of the Lowcountry Staff

Wardle Family YMCA



LITERACY
VOLUNTEERS
OF THE LOWCOUNTRY



HOPE
HAVEN OF THE LOWCOUNTRY
Children's Advocacy and Rape Crisis Center



AGENCY LISTING



American
Red Cross



Meals-On-Wheels
BLUFFTON - HILTON HEAD



BOYS & GIRLS CLUBS
OF THE LOWCOUNTRY, INC.



RONALD McDONALD
HOUSE CHARITIES
OF THE COASTAL EMPIRE



BOY SCOUTS OF AMERICA®
COASTAL CAROLINA COUNCIL



THUMBS UP, INC.
Children's Learning Center

PARTNER **AGENCIES**

ABLE Foundation 843-255-63002, mwagner@bcgov.net

Service coordination, early intervention, day programs, residential services, individual and group respite, and summer camp programs for individuals with developmental disabilities

ACCESS Network Inc. 843-379-5600

Case management, counseling, education and prevention services to people affected by homelessness, substance abuse or HIV/AIDS

Alphabet Junction 843-982-3040

A kindergarten intervention program that provides a multisensory, interactive approach to address the learning needs of at-risk kindergarten children

Alzheimer's Family Services of Greater Beaufort 843-521-9190

Counseling and caring support for Alzheimer's patients and their families

American Red Cross Palmetto Chapter 843-757-7437

Disaster relief; services to the armed forces; blood services and health and safety services; emergency food and shelter for victim assistance

AMIKids Beaufort 843-846-2128, www.AMIKidsbeaufort.org

Behavior modification and educational programs in a residential setting for Department of Juvenile Justice referrals

Bluffton Self Help 843-757-8000, www.blufftonselfhelp.org

Emergency short-term assistance with utilities, rent, food, clothing, medication and other needs

Born To Read 843-379-3350, www.borntoread.org

Promotes early literacy to parents and children through distribution of books and other materials

Boy Scouts Coastal Carolina Council 843-763-0305, www.coastalcarolinabsa.org

Programs for boys and young men to enhance their physical, spiritual and mental development

Boys and Girls Clubs of the Lowcountry Bft 843-986-5437 / Bluff 843-757-2845

HHI 843-689-5565 / Ridgeland 843-812-4357 www.bgclowcountry.org

After-school and summer programs for children

PARTNER **AGENCIES**

Child Abuse Prevention Association (CAPA) 843-524-4350, www.capabeaufort.org
Counseling, shelter and care for abused and neglected children; prevention programs; parent education

The Children's Center Bluffton 843-757-5549, Hilton Head 843-681-2739,
www.thechildrenscentersc.org
Full-day educational child care for children with working parents

Citizens Opposed to Domestic Abuse (CODA) 843-770-1074 / 800-868-2632,
www.codalowcountry.org
Counseling, shelter and care for victims of domestic violence; prevention, education and batterer's programs

Collaborative Organization of Services for Youth 843-521-3150, www.cosybc.org
Collaboration of youth service agencies to obtain therapeutic treatment for children

Consumer Credit Counseling Services 1-800-821-4040, www.cccssavannah.org
Provides professional, confidential counseling on debt management, housing, and consumer credit education

Deep Well Project 843-785-2849, www.deepwellproject.org
Food, clothing, shelter, medical help, drinking water and transportation for individuals in crisis

Early Grade Reading Initiative 843-982-3040
Tutoring through volunteers to boost reading skills of students K-3

Friends of Caroline Hospice 843-525-6257, www.friendsofcarolinehospice.com
Support for people with life threatening illnesses, including personal care and counseling, care-taker respite, counseling and a lending closet

Help Line
Beaufort 843-524-4357 / Bluffton 843-757-4357
Hilton Head 843-686—4357 / Jasper 843-524-4357
Information and referral hotline links people with services to meet their needs

PARTNER **AGENCIES**

HELP of Beaufort

843-524-1223 – Emergency Assistance program

843-812-1718 – Food Delivery program

www.helpofbeaufort.org

Emergency services and healthy noon meals delivered to homebound individuals

Hope Haven of the Lowcountry

1-800-637-7273 / 843-524-2256 / 843-525-6699, www.hopehavenlc.org

Hospital, counseling and court advocacy for child sexual abuse and rape victims and their families

Jasper County Board of Disabilities and Special Needs 843-726-4499

Service coordination, transportation, daytime and vocational programs, residential services for individuals with developmental disabilities and head and spinal cord injuries

Jasper County Council on Aging 843-726-5601

Home delivered and group meals, nutrition education, home repair and health care services to senior citizens

Literacy Volunteers of the Lowcountry

Beaufort 843-525-6658 / Bluffton 843-815-6616 / Hilton Head 843-681-6655,

www.lowcountryliteracy.org

Equips adults with the reading, writing, speaking and math skills they need to succeed in the family, the workplace, and the community

Lowcountry Habitat For Humanity

Beaufort 843-522-3500, www.lowcountryhabitat.org

Affordable housing for low income families

LowCountry Legal Volunteers

843-815-1570, www.lowcountrylegalaid.org

Legal education, advice and representation in family law, landlord-tenant, consumer and employment matters

Meals on Wheels of Bluffton & Hilton Head

843-689-8334 (24-hour voice mail) www.mowblufftonhhi.com

Healthy noon meals delivered to homebound individuals

PARTNER **AGENCIES**

Neighborhood Outreach Connection 843-681-4100, www.noc-sc.org

Community-based approach focusing on helping children master basic skills before entering school and improving academic performance of school-aged children

Operation Holiday Heroes Beaufort 843-982-3040 / Jasper 843-645-6500

Toys and food for families during the holiday season

Penn Center 843-838-2432, www.penncenter.com

Child and youth development services through the afterschool and summer Program for Academic & Cultural Enrichment (PACE)

Play Partners 843-982-3040

Volunteer reading program for three- and four-year-old preschool children to prepare them for Kindergarten success

Ronald McDonald House Charities Dental Van 912-350-7641, www.rmhc.coastalempire.org

Oral health care for children from a mobile unit that visits preschools, public elementary and middle schools and other sites

The Salvation Army 843-524-3727, www.salvationarmyusa.org

Food, clothing, shelter and other necessities for people in crisis or disaster

Second Helpings 843-689-3689, www.secondhelpings.org

Quality surplus food for organizations that serve people in need

Senior Services 843-524-1787, www.seniorservicesofbeaufort.org

Provide noon meals for homebound elderly individuals and referral regarding services for older persons

The Sheldon Project 843-322-5414

After-school tutoring, recreation, summer day camp, health care, adult literacy for Sheldon-area families

The St. Helena Project 843-252-7999

Community-wide collaboration providing in-school tutoring for elementary school students; after-school, adult literacy, health and other programs on St. Helena Island

PARTNER AGENCIES

Success By 6 843-982-3040, www.uwlowcountry.org

Early childhood development initiative designed to ensure that all children ages 0-6 are healthy and prepared to be successful in school and life

THUMBS UP 843-379-8882, thumbsupbft@islc.net

Help for children whose parents have special needs, to reduce the risk of future self-destructive or socially unacceptable behaviors

The Volunteer Center

Beaufort County 843-982-3040

Jasper County 843-645-6500

Promotes volunteerism by recruiting and placing volunteers, including an all-volunteer disaster recovery team

Wardle Family YMCA 843-522-9622, www.ymcabeaufortcounty.com

Athletic programs aimed at improving the quality of life in our community; scholarships for families who can't afford membership

**ADVANCE
THE COMMON
GOOD**



COMMITTEE LISTINGS

2013 Community Investment Panel Members

Steve Hoover

Carl Alston

Mary Hinson

Matt Richardson

Maggie Blank

Doug Azar

Phil Kiser

Mike Petrilli

John Riddick

Christine Wrobel

Barbara Pawlishyn

Matthew Brady

Karen Penchuk

Allyn Schneider

Dawn Vosbury-Van Gundy

April Ford

Karla Cummings

Teresa DeSimone

Sally Fordham

Bob Norwood

Marge Barber

Arlene Jacquette

Herb Jarvis

Al Wood

Kimberly Krivda



Pat Kenworthy

David Rice

Joan Vosbury

J.T. Kline

Bill Breunsbach

Matt Flewelling

Dean Hewitt

Nikki Biskobing

Ben Copping

Dottie McIlraith

Chip Simons

Jerry Smith

Thomas Fischer

COMMITTEE LISTINGS

2013 Beaufort Campaign Cabinet

Bernie Kole, Chairman

Michael Gardner

Christie Trumps

Janet Gresham

Charlie Francis

Jane Sidwell

Lloyd Sidwell

Jim McCornock

Kimberly Smith

Karla Cummings

David Tempel

2013 Bluffton Campaign Cabinet

Bradley Talbert, Chairman

Michael Putich, Vice-Chair

Trey Hunter

2013 Planned Giving/DeTocqueville

Society Committee

Charlie Francis, Chairman

Joe Glas, Vice-Chair

Peter Post

Jim White

Helen Ryan

Ronny Tanner

2013 Hilton Head Campaign Cabinet

Mike Petrilli, Chairman

B. Marc Stuckart, Vice-Chair

Dave Crespan

Terry Tadlock

Tom Trout

Jim Hudson

Kymberley Bigda

Angele Barker

Chappy Chapman

Helen Ryan

Anne Bradley

Kim Dreamer

Dottie McIlraith

Tami Speer

Marty Gleason

Lenore Gleason

Martha Ann McDonald

Beth Mayo



FINANCIALS

ASSETS		
Current Assets		
Cash and Cash Equivalents	\$	1,011,211
Pledges and Grants Receivables		866,701
Total Current Assets	\$	1,877,912
Retricted Assets		
Endowment Investments		746,484
Total Restricted Assets	\$	746,484
Fixed Assets		
Fixed assets		449,548
Accumulated depreciation		-225,295
Total Fixed Assets	\$	224,253
Other Assets		147,002
TOTAL ASSETS	\$	2,995,651
LIABILITIES & EQUITY		
Current Liabilities		
Agency Support Payable		1,247,197
Other Current Liabilities		165,540
Total Current Liabilities	\$	1,412,737
TOTAL LIABILITIES	\$	1,412,737
Equity		
Unrestricted Net Assets		990,830
Board Designated Reserve		216,418
Temporarily Restricted Net Assets		134,128
Permanent Restricted Net Assets		241,538
Total Equity	\$	1,582,914
TOTAL LIABILITIES & EQUITY	\$	2,995,651

STATEMENT OF FINANCIAL POSITION

FINANCIALS

Note 1 – Nature of organization

The United Way of The Lowcountry, Inc. (United Way) is a not-for-profit organization incorporated in Beaufort, South Carolina. The United Way solicits cash and pledge contributions from individuals, businesses and employee groups located within Beaufort and Jasper Counties and contributes the proceeds, net of expenses, to local 501(c)(3) not-for-profit organizations of health and human services approved by the Board of Directors. In addition to conducting fund-raising events, the United Way provides the following services:

Help Line – A telephone network to provide information and referrals on health, human and advocacy services.

Direct services – These services include casework, referrals, disaster assistance, basic emergency assistance, expenditures from the Cancer Fund, Director's Fund, Publix Fund, Operation Holiday Heroes and Project Shelter Escrows and The Volunteer Center, a countywide volunteer resource development and placement network.

Early Grade Reading – Program to help augment elementary education in Beaufort and Jasper Counties, in partnership with both school districts, by recruiting, training and deploying volunteers to help struggling students in reading in eight elementary schools. This initiative is an effort to increase student MAP scores and to ultimately have students reading on grade level by the time they enter the 4th grade.

Community Development – Assesses needs and coordinates development and delivery of health and human services and agency assistance.

Community Investment – Investment of annual campaign funds based on assessment of the need for services provided by local 501(c)(3) not-for-profit organizations, the organizations' financial needs and the outcomes they report as measures of their impact on the local community.

The United Way also acts as an agent in administering the The Sheldon Project, Together for Beaufort, St. Helena Afterschool Program, Coalition on Aging, Beaufort Jasper Active Adult Challenge, Play Partners, Volunteer Income Tax Assistance (VITA) Grant and the Americorps Grant.

FINANCIALS

Note 2 – Summary of significant accounting policies

ACCOUNTING METHOD

The financial statements of the United Way of The Lowcountry, Inc. are prepared using the accrual method of accounting, recognizing the income as earned and expenses as incurred.

FINANCIAL STATEMENT PRESENTATION

The United Way of the Lowcountry, Inc. is required to report information regarding its financial position and activities according to the three classes of net assets; unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

PLEDGES RECEIVABLE AND CONTRIBUTIONS

Contributions are recognized when the donor makes a promise to give to the organization that is, in substance, unconditional. Contributions that are restricted by the donor are reported as increases in unrestricted net assets if the restrictions expire in the fiscal year in which the contributions are recognized. All other donor-restricted contributions are reported as increases in temporarily or permanently restricted net assets depending on the nature of the restrictions. When a restriction expires, temporarily restricted net assets are reclassified to the unrestricted net assets. All pledges receivable are due within one year.

ALLOWANCE FOR UNCOLLECTIBLE PLEDGES

The allowance for uncollectible pledges is computed as a percent of annual campaign pledges receivable as of the end of the year, based on experience in prior years.

INVESTMENTS INCLUDING ENDOWMENT FUNDS

Contributions of securities are recorded at their fair value at the date of donation. Investments in debt and equity securities are measured at fair market value in the statement of financial position. Unrealized gain or loss is recognized in the statement of activities.

PROPERTY AND EQUIPMENT

Property and equipment with costs exceeding \$1,000 are capitalized at cost. Donations of property and equipment are recorded as support at their estimated fair value. Property and equipment are depreciated using the straight-line method over their estimated useful lives.

INCOME TAXES

United Way of the Lowcountry, Inc. is exempt from income tax under Section 501(c)(3) of the U.S. Internal Revenue Code and has been determined by the Internal Revenue Service not to be a private foundation under Section 509(a) of the Code.

CONCENTRATIONS

Pledges receivable are almost exclusively from individuals, corporations, and employee groups located within Beaufort and Jasper Counties, South Carolina.

FINANCIALS

USE OF ESTIMATES

The preparation of financial statements, in conformity with accounting principles generally accepted in the United States of America, requires management to make estimates and assumptions that affect certain reported assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

MEMBER CHARITY FEES

United Way of the Lowcountry, Inc. does not charge fees to process donations that are directed to another United Way agency.

Note 3 – Cash and cash equivalents

Bank balances are secured by the Federal Deposit Insurance Corporation up to \$250,000. The United Way monitors its positions with, and the credit quality of, the financial institutions that are counterparties to its financial instruments and does not anticipate nonperformance by these counterparties. Bank balances totaled \$1,011,211 at December 31, 2013. At December 31, 2013, the organization's uninsured deposits in transit totaled \$153,510.

FINANCIALS

Note 4 - Investments

Investments at year-end recorded at fair market values consisted of the following:

ENDOWMENT FUNDS	<u>Fair Market Value</u>	<u>Cost</u>
Community Foundation of the Lowcountry	\$ 103,855	\$ 77,343
Clarece Walker Legacy Fund, Community Foundation. Lowcountry	5,427	5,000
General Fund, Coastal Community Foundation	346,221	271,498
Camp St. Mary Fund, Coastal Community Foundation	126,594	108,786
Clarece Walker Legacy Fund Fund, Coastal Community Foundation	<u>164,387</u>	<u>37,000</u>
Total	\$ 746,484	\$ 499,627

Asset allocations targeted by the Community Foundation of the Lowcountry, Inc. ("CFLC") and the Coastal Community Foundation of South Carolina, Inc. ("CCFSC") are as follows:

	<u>CFLC</u>	<u>CCFSC</u>
Domestic Equities (Large, Medium, Small)	20.5%	0%
International Equities (Global)	15.5%	57%
Hedge and Private Equity Funds	9.9%	0%
Fixed Income	19.0%	18%
Natural Resources	6.2%	0%
Real Estate	3.2%	0%
Diversifying Absolute Return	10.6%	10%
Real Assets	.5%	15%
Emerging Markets	<u>14.6%</u>	<u>0%</u>
Total	100%	100%

FINANCIALS

Note 5 – Property and equipment

Property and equipment consisted of the following:

Land and Building	\$270,267
Furniture and equipment	174,646
Leasehold Improvements Jasper	<u>4,635</u>
Total	\$449,548
Accumulated depreciation	<u>(225,295)</u>
Total property and equipment	\$ 224,253

Note 6 – Unrestricted net assets

Unrestricted net assets of the United Way of The Lowcountry, Inc. at December 31, 2013, are summarized as follows:

Currently unrestricted	\$5,866
Reserve Fund	216,418
Invested in property and equipment	235,793
Board designated for endowment	376,471
Alexis de Tocqueville Endowment Fund	<u>76,084</u>
Total unrestricted net assets	\$910,632

FINANCIALS

Note 7 – Temporarily restricted net assets

The United Way of The Lowcountry, Inc. receives contributions and raises funds that are restricted for various charitable purposes. The purposes and amounts of these temporarily restricted funds at December 31, 2013 are as follows:

Beaufort Jasper Active Adult Challenge	\$ 44,958
Together For Beaufort Report Fund	40,703
Publix Emergency Fund	30,435
Operation Holiday Heroes Escrow	9,537
Endowment Printing Escrow	3,253
Grant Sheldon Escrow	1,913
Eat Smart Move More Lowcountry	1,784
Early Readiness T/B Objective	1,133
Cancer Fund	362
Other escrow accounts	<u>50</u>
 Total temporarily restricted net assets	 \$ 134,128

Note 8 – Permanently restricted net assets

Permanently restricted net assets consist of donor restricted funds contributed for an endowment to support the general purposes of the United Way. The fund is intended to be permanent so that the principal is not invaded.

FINANCIALS

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THANK YOU!



United Way of the Lowcountry, Inc.

Thanks to your support, 2013 was a successful year on both a monetary level and a human services level.

After all, there are faces and names of people we help, not just statistics.

As a supporter, you recognize and affirm United Way of the Lowcountry's standing as a force for change in the community. You are partners with us in helping address the health, education, income and basic needs of thousands in our area.

Thank you for helping us achieve positive outcomes and for *Living United* with United Way of the Lowcountry!

