

# 2016-2017 Annual Report United Way of the Lowcountry, Inc.



United Way of the Lowcountry, Inc.  
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[www.uwlowcountry.org](http://www.uwlowcountry.org)



# GIVE. ADVOCATE. VOLUNTEER.

Thanks to the community's support and generosity, United Way of the Lowcountry successfully fulfilled its \$2.5 million goal in 2016-2017. This is certainly a testament to our community, especially after suspending the campaign for six weeks due to the impacts of Hurricane Matthew.

This year, United Way of the Lowcountry (UWLC) supported 32 agencies and 46 programs that are helping to improve the lives of our neighbors and create lasting, positive change in our community by addressing the root causes of key issues, focusing on Basic Needs, Education, Health and Income/Family Stability. In order to receive UWLC funding, prospective grantees complete an in-depth application and undergo a thorough review process.

In 2016 UWLC's HELPLINE, an initiative made possible by donations, received more than 1600 calls for help, served 566 individuals and families who walked into the United Way office and provided 2,665 referrals. This program provides referrals to other human service agencies, in-depth advocacy, and, in extreme cases, direct assistance. These numbers significantly increased from the previous year due to the impacts of Hurricane Matthew. Beneficiaries of this program primarily need help meeting their basic needs, such as food, utilities, and shelter.

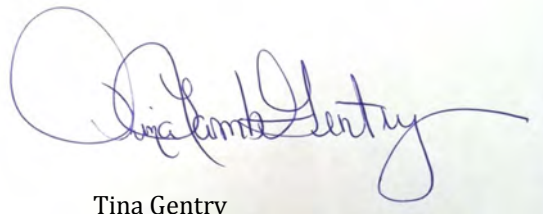
Together we are making a difference and getting measurable results. Through our direct-impact program, Read Indeed, we are improving literacy in our community. Since 2012, this program has continued to grow and this year expanded to 11 schools. With more than 250 volunteers and AmeriCorps members, 94% in Jasper County and 95% of students in Beaufort County increased their reading test scores, opening doors to a brighter future.

With the support of volunteers and donors, United Way of the Lowcountry touched over 32,500 lives in Beaufort and Jasper Counties this past year. We need your support to help us continue to meet the needs of our neighbors and move the needle.

Best Regards,



Jon Rembold  
2016-2017 Board Chairman



Tina Gentry  
President & CEO



# 2016-2017 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 counties.*

## Values

Accountability

Responsiveness

Integrity

Innovation

Stewardship

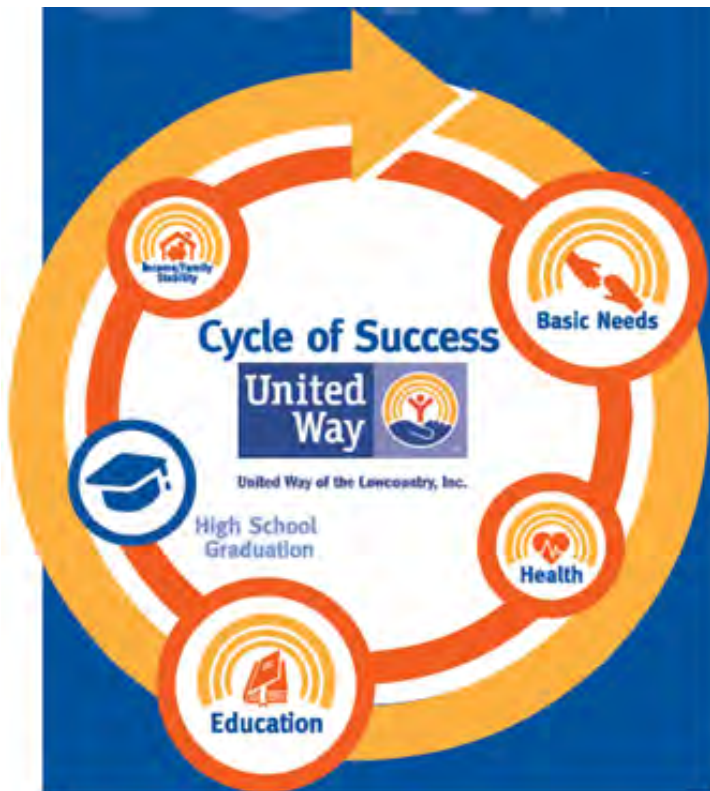
Diversity

Courage

Results



# COMMUNITY IMPACT



## Community Impact Volunteers

Becky Francis, Community Impact Chair

### **Panel Chairs**

Bill Breunsbach, April Ford, Bob Norwood, Kimberly Slovensky

### **Panel Reviewers**

Carl Alston, Marge Barber, Gary Bond, Karla Cummings, Matt Flewelling, Tom Hermann, Dean Hewitt, Arlene Jacquette, Patricia Kenworthy, Phil Kiser, Joshua Mathews, Amber Mulligan, David Rice, Patricia Stone

Since the 1950s, United Way of the Lowcountry has leveraged the collective generosity of our region in order to serve those most in need. However, despite the money raised and all of the services provided, many problems in our community continue and some have even grown worse.

What we found was that in order to create positive change in the human condition at the community

level, we needed to make significant changes in the approach to our work. Simply moving dollars around between programs – even with the best needs assessment, the best outcomes process and the best agencies – is not enough to create the kind of significant sustained change in conditions that our community and the people in it want to see.

Equipped with this information, in June of 2015 the UWLC's Board approved an exciting new approach to serving those needs that will allow significantly greater impact on the pressing human service issues facing our region.

The foundation of our Community Impact Plan is a call to action to create lasting, positive impact in the areas of Education, Basic Needs, Income/Family Stability, and Health. This is a bold, progressive plan for dealing with the upstream problems of the Lowcountry while continuing to keep an active role in the down-river emergencies.

And we aren't doing it alone! We have asked the community at large, and all of our current partner agencies to help us as we establish goals, identify strategies, and work to determine the best indicators that will help track how we are able to improve the lives of Beaufort and Jasper residents.

Stay tuned for updates on how UWLC plans to deliver solutions for the issues that our residents identified as being most pressing to them.

# COMMUNITY IMPACT

## Community Impact Process Changes

**Electronic Application Submissions** – This year was the first year United Way of the Lowcountry utilized Community Force, the electronic software system to manage the application process. It was very well received by both the applicants and United Way donors that conduct the reviews.

**Competitive Process** – In order to guarantee that UWLC was funding the programs that the community felt would provide the most impact, agencies entered a rigorous process, created through the use of a phased application process, with only the top programs making it to the final review phase.

With the transition to a competitive funding process, a new scoring metric was required in order to take a largely subjective process and make it quantitative, while still keeping some subjectivity. The new metric uses weighted scoring and is “double blind”, meaning the reviewer does not know the overall program score until the review is done and the reviewers cannot view other panel members scores until the final discussion takes place. This assists in preventing biases or being swayed by other reviewers.

**Tracking Common Indicators** – A series of work sessions were held to finalized the key Performance indicators (KPI's) that will be used moving forward, to track how United Way funding is impacting the priority areas of Education and Health.

**Staggered Funding Schedule** – With the change to a two-year funding process, and with the delay experienced in creating KPI's for Education and Health, it provided the opportunity to implement a staggered funding schedule. In the 2017-2018 funding cycle, Basic Needs and Income/Family Stability programs were reviewed. In the 2018-2019 funding cycle, Education and Health programs will be eligible to apply for funding. This staggered funding schedule allows for a concentrated focus to be placed on two priorities per year.

**Step Down Funding Strategy** – Research conducted on best practices indicated that step-down funding strategies assists in ensuring that programs do not become dependent on grant funding for service provision and ensures programs have a sustainability plan in place.

**Shift To Community Impact Funding** – The step-down funding strategy also provided the ability for the Community Impact process to base funding recommendations on actual dollar amounts already raised and held in designated accounts.

# COMMUNITY IMPACT

While we are hard at work creating a new approach to achieving positive changes in our community, we continue to provide financial support to **32** agencies through **46** programs. Those agencies can be found below:

Able Foundation's Camp Treasure Chest	Wardle Family YMCA
Alzheimer's Family Services of Greater Beaufort	American Red Cross - Palmetto Chapter
AMIkids Beaufort	Bluffton Self-Help
Born to Read	Boys and Girls Clubs of the Lowcountry
Child Abuse Prevention Association	Citizens Opposed to Domestic Abuse
Coastal Carolina Council-Boy Scouts	Consumer Credit Counseling Service
Collaborative Organization of Services for Youth	Family Promise of Beaufort County
Good Neighbor Free Medical Clinic	HELP of Beaufort
HHI Deep Well Project	Hope Haven of the Lowcountry
Jasper County Council on Aging	The Literacy Center
Lowcountry Habitat for Humanity	Love House Academy
Lowcountry Legal Volunteers	Neighborhood Outreach Connection
Programs for Exceptional People	Resource Foundation for Jasper Co. DSN
Ronald McDonald Dental Van	Salvation Army
Second Helpings	Senior Services
The Children's Center	Thumbs Up, Inc.

**19** agencies provide services across all of Beaufort County

**17** agencies are physically located in Beaufort County, but provide services to residents of both Beaufort and Jasper counties

**8** agencies focus on services for Northern Beaufort County

**5** agencies focus on services for Southern Beaufort County

**2** agencies are physically located in and exclusively serve Jasper County but have not received funding yet.

# EDUCATION: MAKING AN IMPACT

## **Education Impact Committee 2016/17**

Dr. Renarta Tompkins, Chair — USCB

Kelli Boniecki — TCL

Dr. Myrtis Brightharp-Walker — JCSD

Elizabeth Brinkerhoff —USCB

Darlene Burroughs—Hardeeville Library

Dena Dardzinski— Retired Educator

Carmen Dillard - BCSD

Phyllis Doyle

Tom Henz—NBSC

Ashley Hutchison—BCSD

Melissa Murray - BCSD

Marva Tigner—JCSD

Reading is the basic building block that gives children the tools they need to engage in a lifetime of learning. Sadly, according to the National Assessment of Education Progress, only about one-third of our nation's fourth graders can read proficiently. Most people don't realize that elementary school reading is a critical predictor for high school success. Kids are learning to read until 4<sup>th</sup> grade, after that they are reading to learn. Nationally, only 33% of America's 4<sup>th</sup> graders read proficiently. Right now only 34% of fourth graders in our state read on grade level. That means that too many SC children go through their days without fully understanding materials presented in class, and without gaining the reading skills necessary to advance in schools and succeed in the workforce.

Our goal, along with both Beaufort and Jasper county school districts is to get at least 80% of our students reading on grade level by the time they reach the 4<sup>th</sup> grade..

United Way of the Lowcountry's Early Grade Reading Program, now known as Read Indeed!, continues to have a huge impact on the students who need it the most in our

community. During our 4<sup>th</sup> year of the program, over 250 volunteers and AmeriCorps members diligently gave their time to work with students one on one in pre-k and in grades K-3 in 10 elementary schools in the low-country. These volunteers provided help developing reading skills and also building confidence to those students who otherwise would not receive the extra boost they need. During the 2015/2016 school year, 463 k-3 grade students who received tutoring were measured using their MAP scores and STAR. Of those students, a full 95% of students in Beaufort and 94% in Jasper increased their test scores in reading.

Because of success of Read Indeed!, the program is now in it's 5<sup>th</sup> year and continues to expand, even adding summer school tutoring to minimize the rates of students experiencing summer learning loss. As the program continues to make an impact in Beaufort and Jasper Counties, United Way of the Lowcountry will research additional ways to enhance the program.



## **250+ Volunteers currently serve at:**

### **Elementary Schools**

Hardeeville Elementary

Hilton Head Island Elementary for the Creative Arts

Hilton Head Island Early Childhood Center

Joseph Shanklin Elementary

Lady's Island Elementary

MC Riley Elementary School

Red Cedar Elementary

Ridgeland Elementary

Royal Live Oaks Academy

St. Helena Elementary

### **Day Care Center**

The Penn Center

# EDUCATION: MAKING AN IMPACT

*“Working with first grade students one on one at Ridgeland Elementary is a very special honor. The students come to us accustomed to failing, feeling small and often afraid, struggling to read. Sometimes the progress is slow, small steps and sometimes the progress is great.*

*But I will always cherish the look of pride and confidence on their sweet faces when they finish a book or figure out a new word. I believe these steps, big or small, stay with them always and positively change the course of their lives.”*

- Sukie Azar, Tutor in Jasper County Schools



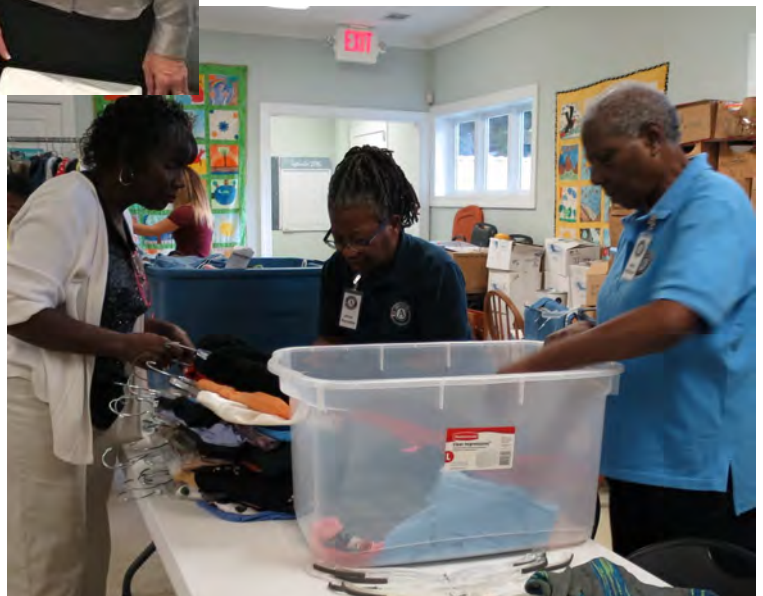
# AMERICORPS



In the fourth year of the AmeriCorps grant, more than 30 AmeriCorps members continued to provide a needed infusion of stability by serving as tutors in the Read Indeed! Program.



AmeriCorps members also collaborated with United Way of the Lowcountry funded agencies for National Days of Service.



# HELPLINE

## NEED HELP?



FOOD



SHELTER



PAY BILLS



GET CARE



TAX HELP

United Way of the Lowcountry's HELPLINE assists people right here in our community like the Williams family. They went from being a two income household to just one when their youngest child, "Baby Joey," was born with a rare heart condition. He has undergone numerous surgeries since he was born, which has meant countless trips back and forth to MUSC in Charleston.

With less income coming in and an increase in unexpected out of pocket and medical expenses, Joe Williams says he had to put his pride aside and reach out for assistance. Through the generosity of our community, the HELPLINE provided support services to help provide the Williams family with the basic essentials they needed during a difficult time so they could focus their attention on Baby Joey and their family.

"United Way has been an answer to our prayers," said Joe Williams. "When we needed them, they were there."

Whether you need help finding quality aftercare programs, care for an aging parent, a haven from domestic violence or emergency assistance, United Way's HELPLINE is the number to call when you need help and don't know where to turn.

Our trained HELPLINE specialists are good listeners, blending understanding and expertise to provide information and referrals, advocacy, and direct assistance.



In 2016, the HELPLINE received 1644 calls for help and assisted 566 individuals and families who walked in our doors looking for a lifeline. Utility assistance topped the list of requests this past year. Due to the impacts of Hurricane Matthew, home repairs were the second most requested need, followed by rent and food assistance. In total, 2,665 referrals were provided to agencies helping those in need, 486 cases were provided in-depth advocacy, and 119 cases of direct assistance were provided to prevent our residents from falling through the cracks, which nearly doubled from the previous year.

# WOMEN UNITED



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

Women United members work together to engage, educate and empower others to become leaders and actively participate in the betterment of our community. Their mission is to mobilize the caring power of women together to advance the common good by focusing on education in the forgotten pockets of Beaufort and Jasper Counties.

In March 2017, Women United held their annual Power of the Purse event at Dataw Island Clubhouse to raise money for the "Breaking Barriers to Education Fund."

This fund addresses the needs of local schoolchildren that aren't currently met by another agency. Proceeds from the Power of the Purse provide direct services to children and families across Beaufort and Jasper Counties. This fund seeks to help fulfill needs that would otherwise prevent a student from attending school or from reaching their full potential.

The Breaking Barriers to Education Fund is administered by the United Way of the Lowcountry HELPLINE, which works with school officials to directly remove financial barriers that stand in the way of a child's education.



This past year, Women United expanded Operation Backpack. By working with school counselors, they provided backpacks, school supplies and uniform shirts for more than 465 students throughout Beaufort and Jasper Counties to help set them on a path for a successful school year. This upcoming school year, they plan to serve even more children.

To help fulfill their mission, Women United also hosts free quarterly leadership development workshops and networking events throughout the year.

# JASPER COUNTY

Kim Malphrus of Kim Malphrus Realty served as the United Way's 2016 Campaign Chair for Jasper County. Malphrus succeeded the 2015 Campaign Chair, Wil Saleeby. Malphrus has been a great addition to Jasper's campaign team and to the Advisory Committee and to the United Way of the Lowcountry's Board of Directors.

## 2016 Jasper Advisory Committee

Kim Malphrus, Campaign Chair

Bonnie Bennett

Beth Gregorie

Carl Kilpatrick

Thomas McClary



In October 2015 the United Way of the Lowcountry's Jasper office held an event called **"Share and Care – Jasper County"**. We asked that people donate canned and boxed food, baby diapers, personal care products for adults and people with disabilities. These items were subsequently shared with two local churches and the Jasper Board of Disabilities and Special Needs. We had planned that this would be an annual event and grow each year. However; due to Hurricane Matthew we were unable to have it in October 2016. We look forward to holding it again in 2017.

United Way of the Lowcountry along with other local organizations and FEMA came together at the Jasper County Farmer's Market in November 2016 to provide information and referrals to those who experienced damage to their dwelling or financial hardship due Hurricane Matthew.

The United Way of the Lowcountry continues to talk and share with civic organizations, businesses, and neighborhood associations what we do in the community. As always, we are recruiting and training volunteers for our Early Grade Reading Program which connects trained reading tutors with children in need of supplemental instruction at both Jasper County elementary schools.

# 18TH ANNUAL CATHOLIC HEART WORK CAMP

Unlike anything you've ever seen that brings an instant smile to your face. 350 plus students from across the nation visited the Lowcountry for a week during their summer break, to lend their time and talents to helping make life better for the elderly, disabled and families in need throughout Beaufort and Jasper Counties.

Each summer, since 1998, United Way of the Lowcountry helps coordinate the Catholic HEART (Helping Everyone Attain Repairs Today) Workcamp. The camp is about SERVICE, CONNECTION and LOVING OTHERS. CHWC provides youth groups, teens and adult leaders service opportunities to restore homes and HEARTS, feed the hungry, lift the spirits of children, bring joy to the elderly and disabled and offer assistance while partnering with social agencies.

This program's mission is to revitalize communities and beautify homes of the elderly, the disabled and those who cannot afford the needed repairs. While in the Lowcountry, the campers, along with more than 100 adult leaders and local volunteers work together on at least 55-60 projects. Work ranges from yard work and minor repairs to installing handicap ramps. Thanks to donations from businesses like Glidden Paint who has donated all of the paint for this project since 1998, we can work together to address those needs in our community.

From June 19th through June 24<sup>th</sup>, 2016, over 300 teenagers and 150 adult leaders provided help and service to over 60 residents and agencies in Beaufort and Jasper counties. We look forward to partnering with Catholic HEART Workcamp again during the week of June 18<sup>th</sup>, 2017.



# VITA

United Way of the Lowcountry continues to offer free tax preparation in Beaufort, Jasper, and surrounding counties by partnering with Together for Beaufort and the Lowcountry Area VITA Coalition. This program is designed to connect eligible taxpayers with IRS-certified volunteers who prepare and e-file taxes free of charge.

The VITA (Volunteer Income Tax Assistance) program intends to prepare over 2,000 tax returns in 2017 for low-income, elderly, and differently abled individuals and families in the Lowcountry. Each year since 2008 the VITA program has returned over \$3 million dollars to the pockets of local residents and saved over \$400,000 in tax preparation fees.



Individuals who received tax preparation services through the VITA program also received information about and referrals 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, and other organizations.

## ONLINE DIRECTORY

United Way of the Lowcountry partners with the Beaufort County Human Services Alliance, Palmetto Breeze and the USCB Human Services Program to ensure that the regional Human Services Directory —now available online at [www.uwlowcountry.org](http://www.uwlowcountry.org)— contains the most up-to-date information.

Formerly a printed directory, the online version makes it easier for service providers and the public to learn about and connect with resources in our community. 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.

The resource guide is easily accessible on the United Way website.

# BOARD OF DIRECTORS

## 2016-2017

Jon Rembold  
*Chairman of the Board*

Katie Phifer  
*Treasurer*

Dr. Renarta Tompkins  
*Secretary*

Mark O'Neil  
*Immediate Past Chair*

Gale Brown  
James "Doug" Douglas  
Phyllis Doyle  
Becky Francis  
Marty Gleason  
Kim Malphrus  
Christopher McCorkendale  
Michael Nix  
Peter Post  
Gerald H. Schulze  
J. Ashley Twombly

# CORPORATE AND INDIVIDUAL EVENT SPONSORS

Amy Bowman State Farm Agency  
Avery Cleland  
Carter McKay  
CBW Bookkeeping Services, LLC  
Charlie Francis  
Christian Kata  
Cora Bett Thomas Realty & Associates  
Dataw Island  
David House  
Dividend Assets Capital, LLC  
Gilbert Law Firm  
Hargray  
Harris Pillow Supply  
Kinghorn Insurance  
Justin Neumann  
Katie C. Phifer, CFP—Bezilla Kinney Wealth  
Management Group, Wells Fargo Advisors



MDVIP—Irina Borissova, MD  
Michael Garcia  
Malcolm Goodridge  
Murr Printing  
One Blood  
Palmetto Electric  
Palmetto State Bank  
Pink Magazine  
Publix  
RE/MAX—Chris & Maria Skrip  
Robinson Grant & Co.,  
P.A.  
Salt Line Construction  
Secession Golf Club  
SF Jenkins Interiors,  
Inc.  
Show Turf  
Technical College of the Lowcountry  
The Island News  
The Lane Construction Corp.  
Turbeville Insurance  
Turner Home Inspection  
VinCo ATM Services



# PACESETTERS



Alpha Media  
 Alzheimer's Family Services  
 Atlantic Community Bank  
 American Association of Insurance  
 AMIKids  
 AT&T – Hilton Head & Bluffton  
 Bank of America  
 Bank of Walterboro  
 BB&T  
 BB&T-Carswell  
 Beach Properties of Hilton Head  
 Beaufort County Employees  
 Beaufort County Schools  
 Beaufort Housing Authority  
 Beaufort Jasper Active Adult  
 Challenge  
 Beaufort Jasper Hampton  
 Comprehensive Health Services  
 Beaufort - Jasper Water & Sewer  
 Authority  
 Beaufort Memorial Hospital  
 Belk  
 Bennett Law Firm, PA  
 Big D's Royal Tees  
 Blossom's on Main  
 Bluffton Self Help  
 BNC Bank  
 Born to Read  
 Boys & Girls Club of the Lowcountry  
 Broad Creek PSD  
 Bundy Appraisal & Management  
 Carey and Company  
 CBC National Bank  
 Charter I Realty & Marketing –  
 Mr. & Mrs. Andy Twisdale  
 Children's Center  
 Child Abuse Prevention Association

City of Beaufort  
 Clark Cramer & Frank, LLC  
 Classic Consignments, Inc.  
 Coastal Carolina Hospital  
 Coastal Carolina Medical Staff  
 Coastal Plains Insurance-Bluffton  
 Coastal Plains Insurance-Hilton  
 Head  
 CODA Citizens Opposed to  
 Domestic Abuse  
 Collins Group Realty  
 Community Service Associates –  
 Sea Pines  
 Consumer Credit Counseling  
 D & R Auto Brokers  
 D & S Heating & Cooling, Inc.  
 Daniel Henderson - Attorney  
 Dataw Island Club  
 Deep Well Project  
 Degler Waste Services, Inc  
 Department of Motor Vehicles –  
 Bluffton & Beaufort  
 Disney's Hilton Head Resort  
 Dividend Assets Capital, LLC  
 Dividend Growth Advisors  
 El Ranchito Restaurant  
 Espy Lumber Company, Inc.  
 eviCore  
 Family Promise  
 Farm Bureau of Jasper County  
 Federal Express  
 First Citizens Bank  
 First Steps  
 Forsythe Jewelers  
 The Greenery  
 Hargray Communications  
 Harris Teeter - HHI  
 Harry C. Brown, Sr. Law Firm  
 Hand & Tanner Financial Group  
 Hilton Head – Bluffton Chamber of  
 Commerce  
 Hilton Head Hospital  
 Hilton Head Hospital Staff  
 Association



Hilton Head Public Service District  
 Home Goods  
 The Homes Finder Realty Group  
 Hope Haven of the Lowcountry  
 HUB International  
 Indigo Consulting Group  
 Island Packet/ Beaufort Gazette  
 Jasper County Board of Disabilities  
 & Special Needs  
 Jasper County Chamber of  
 Commerce  
 Jasper County Council on Aging  
 Jasper County Schools  
 Jasper Feed and Seed  
 JC Penny  
 June & Associates, PA  
 Kim Malphrus Realty, Inc.  
 Kinghorn Insurance-Beaufort  
 Kroger – HHI & Bluffton  
 The Lane Construction Corporation  
 Lawn Solutions  
 Levin Gilley & Fisher LLC  
 Literacy Center  
 Lowcountry Habitat for Humanity  
 Lowcountry Legal Volunteers  
 Marshall's  
 Merrill Lynch  
 McNair Law Firm  
 Minor, Haight & Arundel  
 Morgan Stanley Dean Witter – HHI  
 Nationwide Insurance  
 NBSC, a Division of Synovus Bank  
 Nimmer Turf and Tree Farm  
 O.C. Welch Ford Lincoln  
 Office Depot  
 Palmetto Electric Cooperative  
 Palmetto State Bank

Palmetto Veterinary Hospital  
 Peters, Murdaugh, Parker, Eitzroth  
 & Detrick  
 PNC Bank  
 Port Royal Landing Marina  
 Publix Super Markets  
 Regions Bank  
 Resort Services Inc.  
 Robert's Village Jewelers  
 Robinson Grant & Co.  
 Rotary Club of the Lowcountry  
 Salvation Army  
 Sam's Club  
 Schultz Management Corp.  
 Seabrook of Hilton Head  
 Seclusion Golf Club  
 Second Helpings  
 Senior Services of Beaufort Co.  
 South Carolina Electric & Gas Co.  
 South State Bank  
 State Farm Insurance  
 SunTrust Bank  
 Target  
 TD Bank  
 Technical College of the Lowcountry  
 The Town of Hilton Head  
 Thumbs Up  
 Tidelands Bank  
 Tideland Realty, Inc.  
 TJ Maxx  
 Town of Bluffton  
 Town of Port Royal  
 Tupper, Grimsley & Dean, PA  
 Twenge + Twombly  
 United Parcel Service  
 United Way of the Lowcountry  
 Walgreens  
 Walmart  
 Ward Edwards  
 Wardle Family YMCA  
 Wells Fargo Bank  
 Wells Fargo Advisors



# HURRICANE MATTHEW



**When Hurricane Matthew devastated our community, United Way of the Lowcountry stepped up to mobilize resources and help our neighbors.**

- Designated by Beaufort County as the agency responsible for collecting , administering and distributing funds for disaster services in the aftermath of Hurricane Matthew.
- Calls to our Helpline increased by 1000% (increasing from 35-40 calls a week on average to more than 100+ per day in the weeks following the hurricane).
- UWLC Board of Directors allocated an additional \$100,000 to front-line partner agencies to help meet the immediate needs of our neighbors.



# GRANTS & INITIATIVES



**ABLE Foundation** 843-255-6300, [mwagner@bcgov.net](mailto:mwagner@bcgov.net)

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



**Alzheimer's Family Services of Greater Beaufort** 843-521-9190, [www.afsgb.org](http://www.afsgb.org)

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](http://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](http://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](http://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](http://www.coastalcarolinabsa.org)

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



**Boys and Girls Clubs of the Lowcountry** Bluffton 843-757-2845/ HHI 843-689-3646

Ridgeland 843-645-2323, [www.bgclowcountry.org](http://www.bgclowcountry.org)

After-school and summer programs for children



**Child Abuse Prevention Association** 843-524-4350, [www.capabeaufort.org](http://www.capabeaufort.org)

Counseling, shelter and care for abused and neglected children; prevention programs; parent education

# GRANTS & INITIATIVES



**The Children's Center** Hilton Head 843-681-2739, [www.thechildrenscentersc.org](http://www.thechildrenscentersc.org)  
Full-day educational child care for children with working parents



**Citizens Opposed to Domestic Abuse (now doing business as Hopeful Horizons)** 843-770-1074 / 800-868-2632, [www.codalowcountry.org](http://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](http://www.cosybc.org)  
Collaboration of youth service agencies to obtain therapeutic treatment for children



**Consumer Credit Counseling Services** 1-800-821-4040, [www.cccsavannah.org](http://www.cccsavannah.org)  
Provides professional, confidential counseling on debt management, housing, and consumer credit education



**Deep Well Project** 843-785-2849, [www.deepwellproject.org](http://www.deepwellproject.org)  
Food, clothing, shelter, medical help, drinking water and transportation for individuals in crisis



**Family Promise** 843-815-4211, [www.familypromisebeaufortcounty.org](http://www.familypromisebeaufortcounty.org)  
Provides temporary shelter, family stability, and permanent housing solutions for homeless families with children



**Good Neighbor Free Medical Clinic** 843-470-9088, [www.gnfmcbbeaufort.org](http://www.gnfmcbbeaufort.org)  
Provides free primary care services for low-income uninsured adult residents of Beaufort County



**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



**HELP of Beaufort** 843-524-1223, [www.helpofbeaufort.org](http://www.helpofbeaufort.org)  
Food Delivery program—843-252-4105, [www.helpofbeaufort.org](http://www.helpofbeaufort.org)  
Emergency services and healthy noon meals delivered to homebound individuals



**Hope Haven of the Lowcountry (now doing business as Hopeful Horizons)** 1-800-637-7273 / 843-524-2256 / 843-525-6699, [www.hopehavenlc.org](http://www.hopehavenlc.org)  
Hospital, counseling and court advocacy for child sexual abuse and rape victims and their families

# GRANTS & INITIATIVES



**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



**The Literacy Center** Bluffton 843-815-6616 / Hilton Head 843-681-6655,  
[www.theliteracycenter.org](http://www.theliteracycenter.org)  
Equips adults with the reading, writing, speaking and math skills they need to succeed in the family, the workplace, and the community



**Love House Learning Academy** 843-525-1043, [lovehouseacademy.com](http://lovehouseacademy.com)  
Afterschool and summer programs designed to provide affordable care for children with a focus on education



**Lowcountry Habitat For Humanity** Beaufort 843-522-3500, [www.lowcountryhabitat.org](http://www.lowcountryhabitat.org)  
Affordable housing for low income families



**Lowcountry Legal Volunteers** 843-815-1570, [www.lowcountrylegalvolunteers.org](http://www.lowcountrylegalvolunteers.org)  
Legal education, advice and representation in family law, landlord-tenant and consumer employment matters



**Neighborhood Outreach Connection** 843-681-4100, [www.noc-sc.org](http://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

**Play Partners** 843-837-2000  
Volunteer reading program for three- and four-year-old preschool children to prepare them for Kindergarten success

# GRANTS & INITIATIVES



**Programs for Exceptional People** 843-681-8413, [www.pepghi.org](http://www.pepghi.org)  
Empowering adults with special needs in southern Beaufort County by promoting independence and offering opportunities for social growth and maturity



**Read Indeed! Initiative** 843-837-2000  
Tutoring through volunteers to boost reading skills of students K-3



**Ronald McDonald House Charities Dental Van** 912-350-7641, [www.rmhc.coastalempire.org](http://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.salvationarmycarolinas.org/beaufort](http://www.salvationarmycarolinas.org/beaufort)  
Food, clothing, shelter and other necessities for people in crisis or disaster



**Second Helpings** 843-689-3689, [www.secondhelpingslc.org](http://www.secondhelpingslc.org)  
Quality surplus food for organizations that serve people in need



**Senior Services** 843-524-1787, [www.seniorservicesofbeaufort.org](http://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

**THUMBS UP** 843-379-8882, [thumbsupbft.org](http://thumbsupbft.org)  
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 843-379-3064 / Jasper County 843-645-6500



**Wardle Family YMCA** 843-522-9622, [www.ymcabeaufortcounty.com](http://www.ymcabeaufortcounty.com)  
Athletic programs aimed at improving quality of life; scholarships for families who can't afford membership; afterschool care and summer programs as well as a fully licensed preschool program

# COMMITTEE LISTINGS

## 2016/17 Beaufort Campaign Cabinet

Charles T. Francis, Chair  
D.C. Gilley  
Dan Mackin  
Allison Greco  
James McCornock  
Peter Post

## 2016/17 De Tocqueville Society Committee

Peter Post, Chair  
Charles T. Francis  
Dr. Joe Glas  
James McCornock  
Al Wood

## 2016/17 Bluffton Campaign Cabinet

Gerry Dutkowski, Chair  
RoniLynn Greenhalge  
Patrick Daniels  
Barry Long  
Eileen Cavanaugh

## 2016/17 Jasper Campaign Cabinet

Kim Malphrus, Campaign Chair  
Bonnie Bennett  
Beth Gregorie  
Carl Kilpatrick  
Thomas McClary

## 2016/17 Hilton Head Campaign Cabinet

Marty Gleason, Chair  
Tom Gardo  
Marc Stuckert

# STATEMENT OF FINANCIAL POSITION

## ASSETS

### Current Assets

Cash and Cash Equivalents	\$	877,309
Pledges and Grants Receivables		<u>744,963</u>

<b>Total Current Assets</b>	<b>\$</b>	<b>1,622,285</b>
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### Restricted Assets

Endowment Investments		<u>941,251</u>
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<b>Total Restricted Assets</b>	<b>\$</b>	<b>941,251</b>
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### Fixed Assets

Fixed assets		900,841
Accumulated depreciation		<u>-94,459</u>

<b>Total Fixed Assets</b>	<b>\$</b>	<b>806,382</b>
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<b>Other Assets</b>		<u>166,093</u>
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<b>TOTAL ASSETS</b>	<b>\$</b>	<b><u>3,536,998</u></b>
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## LIABILITIES & EQUITY

### Current Liabilities

Agency Support Payable		1,094,316
Other Current Liabilities		<u>548,614</u>

<b>Total Current Liabilities</b>	<b>\$</b>	<b><u>1,642,930</u></b>
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<b>TOTAL LIABILITIES</b>	<b>\$</b>	<b>1,642,930</b>
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### Equity

Unrestricted Net Assets		500,383
Board Designated Reserve		241,720
Board Designated Endowment		649,136
Temporarily Restricted Net Assets		218,305
Permanent Restricted Net Assets		<u>283,524</u>

<b>Total Equity</b>	<b>\$</b>	<b><u>1,893,068</u></b>
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<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$</b>	<b><u>3,535,998</u></b>
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## FINANCIALS PART II

### 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 that serves both Beaufort and Jasper Counties. 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 that provide health and human services. These contributions to agencies are approved by the Board of Directors. The United Way provides the following services:

- Helpline – These direct 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.
- Volunteer Center—countywide volunteer resource development and placement network.
- Read Indeed! (Early Grade Reading Initiative)— 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 Impact— Grants allocated from the campaign funds based on assessment of the need and overall impact 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 a fiscal agent in administering 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 PART III

## 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 percentage 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.

## FINANCIALS PART IV

### Note 2 – Summary of significant accounting policies (cont.)

#### 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.

#### 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 \$877,309 at December 31, 2016. At December 31, 2016, the organization had \$199,417 in transient or uninsured deposits.

# FINANCIALS PART V

## Note 4 - Investments

Investments at year-end recorded at fair market values consisted of the following, including designated and undesignated funds:

<u>ENDOWMENT FUNDS</u>	<u>FAIR MARKET VALUE (\$)</u>
Community Foundation of the Lowcountry	93,885
Clarece Walker Legacy Fund, Community Foundation of the Lowcountry	5,428
General Fund, Coastal Community Foundation	477,265
Camp St. Mary Fund, Coastal Community Foundation	126,884
Clarece Walker Legacy Fund, Coastal Community Foundation	237,788
<b>Total</b>	<b>\$941,250</b>

	<u>CFLC</u>	<u>CCFSC</u>
Domestic Equities (Large, Medium, Small)	25%	0%
International Equities (Global)	15%	74%
Hedge and Private Equity Funds	10%	11%
Fixed Income	20%	0%
Natural Resources	0%	0%
Real Estate	0%	0%
Diversifying Absolute Return	10%	10%
Real Assets	10%	5%
Emerging Markets	10%	0%
<b>Total</b>	<b>100%</b>	<b>100%</b>

## FINANCIALS PART VI

### Note 5 – Property and equipment

Property and equipment consisted of the following:

Land and Building	716,287
Furniture and equipment	184,554
<b>Total</b>	<b>\$900,841</b>

Accumulated depreciation	(94,459)
<b>Total property and equipment</b>	<b>\$806,382</b>

### Note 6 – Unrestricted net assets

Unrestricted net assets of the United Way of the Lowcountry, Inc. at December 31, 2015 are summarized as follows:

Currently restricted	500,383
Reserve fund	241,720
Board designated for endowment	649,136
<b>Total</b>	<b>\$1,391,239</b>

## FINANCIALS PART VII

### 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, 2016 are as follows:

Hurricane Relief	45,000
Together for Beaufort Report Fund	41,953
Beaufort Jasper Active Adult Challenge	40,593
Publix Emergency Fund	27,093
Women United—Breaking Barriers to Education Fund	13,929
Operation Holiday Heroes Escrow	7,819
Eat Smart Move More Lowcountry	4,739
Grant Sheldon Escrow	4,040
Carecore Help Fund	3,030
Benevolence/Assistance Funds	1,947
Cancer Fund	362
<b>Total</b>	<b>190,505</b>

### Note 8 – Permanently restricted net assets

Permanently restricted net assets of \$241,020 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.

# THANK YOU!

The United Way of the Lowcountry's ability to positively impact Beaufort and Jasper Counties is directly linked to the success of its annual campaign. Thanks to the community's generosity, UWLC is well positioned to improve many lives in 2017-2018!

As a supporter, you recognize and affirm the United Way of the Lowcountry's standing as a leading force for change in our community. Through your support, we will work to meet the immediate needs of our neighbors and create lasting change by addressing the root causes of key issues in our community, focusing on Basic Needs, Education, Health and Income/Family Stability.

Thank you for supporting our efforts and for **LIVING UNITED** with United Way of the Lowcountry!



GIVE. ADVOCATE. VOLUNTEER.  
**LIVE UNITED**™ 