

# 2014 ANNUAL REPORT



**United Way of the Lowcountry, Inc.**

**United Way of the Lowcountry, Inc.**  
2266 Boundary Street, Beaufort, SC 29902  
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[www.uwlowcountry.org](http://www.uwlowcountry.org)

**LIVE UNITED**

Annual Report 2014/2015

## GIVE. ADVOCATE. VOLUNTEER.

Success often begets success, and with a campaign that reached its goal of \$2.3 million in 2013/2014 the challenge was to continue that momentum into this past year.

United Way of the Lowcountry currently supports over 40 programs in over 30 agencies, covering needs ranging from counseling and support groups for families of Alzheimer's patients to shelter from domestic abuse. The agencies all go through a rigorous application and review process that ultimately determines funding levels according to need and accountability benchmarks.

**Last year the United Way of the Lowcountry's Helpline** - another facet of the agency supported by the \$2.4 million campaign funding - received over 2,100 calls and 641 walk-ins. This program provides both referrals to agencies and, when necessary, direct services. This includes addressing needs as simple as helping with the electric bill for someone in-between jobs and paying for a life-changing medical device when insurance won't cover it.

Children are also learning to read thanks, in part, to the Early Grade Reading Program – a direct-impact program started by United Way of the Lowcountry in 2012. In three years of facilitating the tutoring program using volunteer tutors, over 300 children have seen their MAP test scores increase as a result of learning to read. Without your support of this program, children in eight local schools run the risk of falling behind their peers.

Together with volunteers and donors we touched over 32,000 lives in Beaufort and Jasper counties last year. That kind of service can only continue through your support of our organization. Together we can ensure the path of human progress continues to run through the lowcountry.



J. Ashley Twombly

2014/2015 Board Chairman



Tina Gentry

President & CEO

# 2014/2015 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.*

### Values

- Accountability
- Responsiveness
- Integrity
- Innovation
- Stewardship
- Diversity
- Courage
- Results

# LIVE UNITED®

# COMMUNITY IMPACT

*Investing in programs and agencies*

## **Community Investment Panel**

**Bruce Doneff**

*Community Investment Co-Chair*

**Becky Francis**

*Community Investment Co-Chair*

**Nikki Biskobing, Panel Chair**

**Maggie Blank, Panel Chair**

**Bill Breunsbach, Panel Chair**

**April Ford, Panel Chair**

**J.T. Kline, Panel Chair**

**Kimberly Krivda, Panel Chair**

**Bob Norwood, Panel Chair**

**Ed Pappas, Panel Chair**

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 hold them to.

We are proud to announce that in 2015 four new agencies addressing various health, education and basic needs of our community will be joining the United Way fold: the **Good Neighbor Free Medical Clinic on Lady's Island, Family Promise in Bluffton, Love House Ministries in Beaufort and Programs for Exceptional People on Hilton Head.**

Added to the agencies already receiving United Way funding, **it's clear that we've got many of the lowcountry's needs covered.**



# COMMUNITY IMPACT



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.

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

Later in this report you will see a listing of agencies who receive United Way funding for their programs. Know that their success is our success, and without our support some programs might not even exist.

**And without you...we can't** continue to serve them! We hope you share our joy in seeing our agencies succeed!

Map of partner agencies



***WE'VE GOT THE  
LOWCOUNTRY  
COVERED!***



In the 2013/2014 school year, our direct-impact tutoring program – the Early Grade Reading Program, continued the successes we saw in its first year. 309 elementary school students in Beaufort and Jasper Counties were tutored in reading by over 200 volunteers and AmeriCorps members organized and trained by the United Way. Of those students, a full 95% in Jasper and 98% in Beaufort increased their MAP testing scores in reading!

We are now in the third year of EGR, but the program is already seeing positive changes this school year. A tutor in one of our Jasper County schools, LeNolon Edge, told us that the tutoring program has brought him great joy in his first year as a tutor.

**“Just to know that I am able to spend some invaluable one-on-one time with my students while helping them develop their skills and increase their confidence and competence is extremely rewarding,”** he said.

**“I often think that if every able-bodied adult spent one hour per week with one or two students how much further along we would be – our kids are very capable and smart, they just need a little community support!”**

We are committed to continuing the success we have seen in the program's formative years, and with more community support from tutors like LeNolon, we can affect the lives of thousands here in the lowcountry!

## EDUCATION: MAKING AN IMPACT

Over 200 tutors currently serving in:

Hardeeville Elementary	Hilton Head Elementary for the Creative Arts
Red Cedar Elementary	Pritchardville Elementary
St. Helena Elementary	Ridgeland Elementary
	Shanklin Elementary

### *Early Grade Reading*

#### Education Impact Committee

**Dr. Renarta Tompkins- Chair person**

**Pat Ash**

**Kelli Boniecki**

**Dashon Ellis-Campbell**

**Carmen Dillard**

**Phyllis Doyle**

**Kathy Folsom**

**Susan Gordon**

**Ashley Hutchison**

**Dr. Myrtis Brightharp Walker**



# AMERICORPS



In the second year of a three-year grant, over 30 AmeriCorps members continued to provide a needed infusion of stability by serving as tutors in the Early Grade Reading Program!





## HELPLINE

### *Advocacy. Referrals. Assistance.*

A portion of the funds raised by the United Way of the Lowcountry helps cover the United Way Helpline, a referral and direct-assistance provider. In 2014, the Helpline received 2,138 calls for help and 641 walk-ins, a significant increase over 2013. Of those calls and walk-ins, over 2,500 were referred to United Way partner agencies, while nearly 100 were provided with direct-assistance for needs outside what is provided by other agencies.

Without Helpline, Byron Heyward might never be able to move around his apartment again. Byron was born with a medical condition that limits the use of both of his legs and one arm. Despite this limited mobility, he has worked steadily since high school and uses a motorized wheelchair to continue to live independently. Recently, while on a public sidewalk, Byron was hit by a car whose driver was texting. While Byron was physically recovering, the United Way was able to step in and put an end to his mental anguish by combining with a partner agency and purchasing a new wheelchair.

There are many like Byron who depend daily on services for needs outside of what is currently provided by other agencies – needs ONLY met by the United Way Helpline.



Byron Heyward on the golf course

*2,138 calls*  
*641 walk-ins*  
*In 2014*





# WOMEN'S LEADERSHIP COUNCIL



*Inspiring, educating, encouraging*

### WLC Steering Committee

- Katie Phifer—Chair
- Leigh Copeland
- Gloria Duryea
- Kylie Hamaker
- Donna Klein
- Amy Pinckney
- Ashley Rhodes
- Daisy White

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.

**In 2014, the WLC held their first "Power of the Purse" event in Oldfield. The event raised money for the "Breaking Barriers to Education Fund."**

This fund addresses the needs of local schoolchildren that aren't currently met by another agency.

Like the need to breathe...

The mother of a local 10-year-old girl came to us needing help with the electric bill. Her daughter wears an oxygen mask 24 hours a day using one of two interchangeable tanks. While she is breathing with the aid of one tank, the other is constantly charging, putting considerable drain on the electricity in their house and causing a spike in the monthly bill. Her mother has applied for a permanent disability pension, but until that comes through the United Way has stepped in to provide emergency resources.



The WLC also joined with CityPak of Chicago—a non profit donor of backpacks for the homeless—to start Operation Backpack in the lowcountry. Plans are to distribute over 50 backpacks equipped with nonperishables and essentials to the homeless in our area through partner agencies in 2015.

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!





## 16TH ANNUAL HEART CAMP



Each summer, United Way of the Lowcountry helps coordinate the Catholic Heart Work Camp. During this week, hundreds of teens from around the country come to the area to complete simple home repairs for those unable to afford or physically complete the minor projects to make their homes more livable. The teens will travel throughout Beaufort and Jasper Counties to complete the projects.

These projects include but are not limited to:

Building or repairing steps and ramps

Painting

General clean-up & trash removal

Simple landscaping

We know that there are many in the Beaufort and Jasper area who may have home improvement projects— our goal is to help those who have the greatest needs due to lack of resources, poor health, age, etc. Thanks to donations from businesses like Glidden Paint and Home Depot, we can work together to address those needs.

From June 22 through June 28th, 2014, over 300 teenagers and adults converged in the lowcountry to make minor repairs to over 35 houses for people in need! We look forward to partnering with Catholic Heart Work Camp again in 2015!

## VITA

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

The VITA (Volunteer Income Tax Assistance) program intends to prepare over 2,500 tax returns in 2015 for local working individuals and families in the Lowcountry. The VITA program returns nearly \$4.2 million dollars back into the pockets of our residents and saves over \$400,000 in tax preparation fees.

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 four million dollars.

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, and other organizations.



## 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](http://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

**J. Ashley Twombly**

*Chairman*

**Mark O'Neil**

*Chair-Elect*

**Tracy Greco**

*Treasurer*

**Brad Talbert**

*Secretary*

**Christopher McCorkendale**

*Immediate Past Chairman*

**Bruce Doneff**

**Phyllis Doyle**

**Charlie Francis**

**Craig Harney**

**Bernie Kole**

**Dr. Randy Lamkin**

**James McCornock**

**Katie Phifer**

**Marc Stuckart**

**Dr. Renarta Tompkins**

**LIVE UNITED**



[www.uwlowcountry.org](http://www.uwlowcountry.org)





## JASPER COUNTY

The 2014/2015 Jasper County campaign made its goal for the first time in four years! Much of that was due to the hard work of the advisory committee and staff, but it is also indicative of recognition by the citizens of Jasper County that United Way of the Lowcountry is dedicated to providing positive outcomes for people in need.

Jasper County Advisory Committee members also helped recruit and retain volunteers for the Early Grade Reading Program present in two Jasper County Schools.

In December of 2014 United Way of the Lowcountry was present at the 10th anniversary of Coastal Carolina Hospital in Hardeeville and received a generous donation from the employee campaign—the highest total in seven years! Further proof that we're making a difference in the lives of those around us!

### *Jasper Advisory Committee*

Bonnie Bennett

Beth Gregorie

Marianne Hawkins

George Hood

Rev. Thomas McClary

Alexina Strozier

Dr. Vashti Washington



## CORPORATE AND INDIVIDUAL SPONSORS

BMW

Dividend Assets  
Capital, LLC

Hargray

I-Tech

J. Banks Design

Kroger

OC Welch Ford Lincoln

Palmetto Electric

Phifer Contracting

Services

Katie Phifer

Quest Construction

Robinson Grant and  
Co. CPA

Secession Golf Club

South State Bank

Trask and Lynn, CPA

VinCo ATM Services



## PACESSETTERS

Adventure Radio / L&L Radio  
 Aesthetic Dentistry  
 Allen Patterson Residential  
 Allison Ramsey Architects  
 All-Pro Tire & Lube  
 Allstate  
 Alzheimer's Family Services  
 Atlantic Community Bank  
 American Association of Insurance  
 American Red Cross  
 AMIkids Beaufort  
 AT&T – Hilton Head & Bluffton  
 Athena Corporation  
 B.W. Bale & Associates  
 Ballenger Realty  
 Bank of America  
 Bank of Walterboro  
 Barnwell Resources  
 Bay Street Outfitters  
 BB&T Bank  
 BB&T Carswell Insurance  
 Beach Properties of Hilton Head  
 Beaufort County Association of Realtors  
 Beaufort County  
 Beaufort County Schools  
 Beaufort County School District Office  
 Beaufort County Student Services  
 Beaufort Housing Authority

Beaufort Jasper Water & Sewer Authority  
 Beaufort Jasper Hampton Comprehensive Health  
 Beaufort Memorial Hospital  
 Beaufort Oil Company, Inc.  
 Beaufort Regional Chamber of Commerce  
 Beaufort Rentals, LLC  
 Beaufort Surveying  
 Belk  
 Bennett Law Firm, PA  
 Best Buy  
 Bluffton Self Help  
 Bluffton Township Fire  
 BNC Bank  
 Born to Read  
 Boys & Girls Club of the Lowcountry  
 Broad Creek Public Services  
 Buckwalter Commercial  
 CareCore National, LLC  
 Carey and Company  
 Carolina Air, Inc.  
 CBC National Bank  
 Century Link  
 Charter I Realty & Marketing  
 Children's Center  
 CAPA (Child Abuse Prevention Association)  
 Clark Cramer & Frank, LLC  
 Classic Consignments, Inc.  
 Coastal Carolina Hospital

## PACESETTERS

Coastal Florist	First Steps
Coastal Orthodontics	Fordham Market
Coastal Plains Insurance	Forsythe Jewelers
Coastal Pride Co., Inc.	Friends of Caroline Hospice
CODA (Citizens Opposed to Domestic Abuse)	GE Foundation
Coldwell Banker Platinum Partners	GJ's Cars Inc.
Collins Group Realty	Greenwood Communities & Resorts / Palmetto Dunes Resort
Community Service Associates – Sea Pines	Handy Dan's Gas and Convenience Stores
Consumer Credit Counseling	Hargray Communications
D & R Auto Brokers	Harris Teeter - HHI
D & S Heating & Cooling, Inc.	Harry C. Brown, Sr. Law Firm
Deep Well Project	Hand & Tanner Financial Group
Department of Motor Vehicles – Bluffton	Harvey's Barber Shop
Department of Motor Vehicles - Beaufort	HELP of Beaufort
Disney's Hilton Head Resort	Hilton Head – Bluffton Chamber of Commerce
Distinctive Designs in Cabinetry	Hilton Head BMW
Dividend Growth Advisors	Hilton Head Hospital
Dunes Marketing Group / Dunes Real Estate Group	Hilton Head Hospital Staff Association
Dr. Gerald Cummings Aesthetic and Restorative Dentistry	Hilton Head Public Service District
El Ranchito Mexican Restaurant	Home Goods
Espy Lumber Company, Inc.	Hometown Realty
Farm Bureau Insurance of Jasper	Hope Haven of the Lowcountry
Federal Express	Indigo Consulting Group
Fiddlers Seafood Restaurant	Island Packet/Beaufort Gazette
First Citizens Bank	Island Pest Control
	Island Realty
	Jasper County Chamber of Commerce



## PACESETTERS

Jasper County Council on Aging	Office Depot
Jasper County School District	Old South Exterminators
Jasper Feed and Seed	Old Town Vintage Poster
JC Penney	Oyster Cay Collection
June & Associates, PA	Palmetto Electric Cooperative
Kinghorn Insurance-Beaufort	Palmetto State Bank
Kole Construction	Palmetto Properties of Hilton Head
Kroger – HHI & Bluffton	Palmetto Veterinary Hospital
Literacy Center	Park Plaza Liquors and Fine Wines
Live Oaks Physical Therapy	Penn Center
Lowcountry Bicycles	Peters, Murdaugh, Parker, Eltzroth & Detrick
Lowcountry Habitat for Humanity	Pike Appraisal Company
Lowcountry Legal Volunteers	PNC Bank
Lowcountry Real Estate	Port Royal Landing Marina
Lowe's	Port Royal Oral Surgery
Lulu Burgess	Publix Super Markets
Marshall's	Real Estate Professionals
Marriott Hotels	Regions Bank
Merrill Lynch	Resort Services Inc.
McNair Law Firm	Robert's Village Jewelers
Minor, Haight & Arundel	Robinson & Grant, PA
Modern Jewelers	Salvation Army
Morgan Stanley Dean Witter – HHI	Sam's Club
Moss Creek POA	Schultz Management
Murr's Printing	Seabrook of Hilton Head
Nationwide Insurance	Sea Island Bonded Storage
NBSC a Division of Synovus Bank	Sea Pines Resort
Nexsen Pruetz LLC	Secession Golf Club
OC Welch Ford Lincoln	Senior Services of Beaufort County

## PACESETTERS

Shore Beach Services  
 South Carolina Electric & Gas Company  
 South State Bank  
 Southern Tree Services  
 State Farm Insurance  
 Stock Farm Antiques  
 SunTrust Bank  
 Target  
 Taylor's Quality Landscaping  
 Technical College of the Lowcountry  
 TD Bank  
 The Collaborative Organization of Services for Youth  
 The Greenery  
 The Homes Finder Realty Group  
 The Lane Construction Corporation  
 The Outpost  
 Thumbs Up  
 Tidelands Bank  
 Tideland Realty, Inc.  
 TJ Maxx  
 Town of Bluffton  
 Town of Hilton Head  
 Twenge & Twombly Law Firm  
 Two Tomatoes Catering Company  
 Tupper, Grimsley & Dean, PA  
 United Parcel Service  
 United Way of the Lowcountry Staff  
 Walgreens

Wal-Mart  
 Ward Edwards  
 Wardle Family YMCA  
 Webster Rogers, LLP  
 Weichert Realtors - Apex Realty  
 Wells Fargo Bank  
 Wells Fargo Advisors





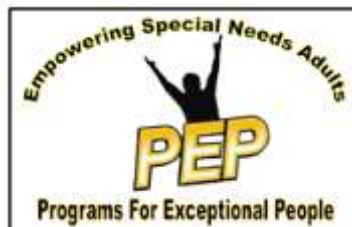
# AGENCY LISTING



American Red Cross



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** 843-255-6300, [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

**ACCESS Network Inc.** 843-379-5600, [www.access-network.org](http://www.access-network.org)  
Case management, counseling, education and prevention services to people affected by homelessness, substance abuse or HIV/AIDS

**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 Bluff** 843-757-2845  
HHI 843-689-5565 / Ridgeland 843-812-4357 [www.bgclowcountry.org](http://www.bgclowcountry.org)  
After-school and summer programs for children

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



## PARTNER AGENCIES

**The Children’s Center Hilton Head** 843-681-2739, [www.thechildrenscenenterssc.org](http://www.thechildrenscenenterssc.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](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.cccssavannah.org](http://www.cccssavannah.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

**Early Grade Reading Initiative** 843-837-2000  
Tutoring through volunteers to boost reading skills of students K-3

**Friends of Caroline Hospice** 843-525-6257, [www.friendsofcarolinehospice.com](http://www.friendsofcarolinehospice.com)  
Support for people with life threatening illnesses, including personal care and counseling, caretaker 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

### **HELP of Beaufort**

843-524-1223 – Emergency Assistance program  
843-252-4105 – Food Delivery program  
[www.helpofbeaufort.org](http://www.helpofbeaufort.org)  
Emergency services and healthy noon meals delivered to homebound individuals

## PARTNER AGENCIES

### **Hope Haven of the Lowcountry**

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

### **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

### **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, consumer and 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

### **Penn Center 843-838-2432, [www.penncenter.com](http://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

## PARTNER AGENCIES

**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@islc.net](mailto: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

**Wardle Family YMCA** 843-522-9622, [www.ymcabeaufortcounty.com](http://www.ymcabeaufortcounty.com)  
Athletic programs aimed at improving the quality of life in our community; scholarships for families who can't afford membership

## COMMITTEE LISTINGS

*2014/2015 Community Investment Panel Members*



Carl Alston  
 Meredith Bannon  
 Marge Barber  
 Debbie Berling  
 Matt Brady  
 Cathy Crocker  
 Karla Cummings  
 Tom Fischer  
 Sally Fordham  
 Matt Flewelling  
 Jodi Gangloff  
 Dean Hewitt  
 Arlene Jaquette  
 Pat Kenworthy  
 Dottie McIlraith  
 Phil Kiser

Mike Petrilli  
 Terry Reese  
 David Rice  
 Matt Richardson  
 Chip Simmons  
 Dawn Vosbury  
 Connie Wegman  
 Al Wood



## COMMITTEE LISTINGS

### 2014/15 Beaufort Campaign Cabinet

Bernie Kole, Chair  
 Karla Cummings  
 Charles T. Francis  
 Michael Gardner  
 Janet Gresham  
 James McCornock  
 Joy Nelson  
 Peter Post  
 Lloyd Sidwell  
 Kimberly Smith  
 Jimmy Taylor  
 Christi Trumps  
 Jim White

### 2014/15 Bluffton Campaign Cabinet

Michael Putich, Chair  
 Eileen Cavanaugh  
 Gerry Dutkowski  
 Stewart Hull

### 2014/15 DeTocqueville Society

#### Committee

Charlie Francis, Chairman  
 Dr. Joe Glas  
 Jim McCornock  
 Peter Post  
 Jim White

### 2014/15 Hilton Head Campaign Cabinet

Marc Stuckart, Chair  
 Dave Crespan  
 Marty Gleason  
 Faith Seiders  
 Angele Barker  
 Helen Ryan  
 Greg Viventi  
 Jeff DeVincentis  
 Chuck Scarminach  
 Joan Stuckart  
 Anne Bradley

### 2013/2015 Jasper Campaign Cabinet

Bonnie Bennett, Chair  
 Thomas McClary  
 Beth Gregorie  
 Marianne Hawkins





## FINANCIALS

<b>ASSETS</b>			
Current Assets			
	Cash and Cash Equivalents	\$	768,741
	Pledges and Grants Receivables		793,535
	Other Current Assets		586
	<b>Total Current Assets</b>	\$	<b>1,562,862</b>
Restricted Assets			
	Endowment Investments		933,721
	<b>Total Restricted Assets</b>	\$	<b>933,721</b>
Fixed Assets			
	Fixed assets		408,718
	Accumulated depreciation		-192,836
	<b>Total Fixed Assets</b>	\$	<b>215,882</b>
	Other Assets		153,991
	<b>TOTAL ASSETS</b>	\$	<b>2,866,456</b>
<b>LIABILITIES &amp; EQUITY</b>			
Current Liabilities			
	Agency Support Payable		1,369,600
	Other Current Liabilities		130,816
	<b>Total Current Liabilities</b>	\$	<b>1,500,416</b>
	<b>TOTAL LIABILITIES</b>	\$	<b>1,500,416</b>
Equity			
	Unrestricted Net Assets		179,565
	Board Designated Reserve		240,823
	Board Designated Endowment		535,245
	Temporarily Restricted Net Assets		132,909
	Permanent Restricted Net Assets		277,498
	<b>Total Equity</b>	\$	<b>1,366,040</b>
	<b>TOTAL LIABILITIES &amp; EQUITY</b>	\$	<b>2,866,456</b>

## 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 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:

- Help Line – 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.
- 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 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.

#### 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.

## FINANCIALS

### 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 \$768,741 at December 31, 2014. At December 31, 2014, **the organization's uninsured deposits in transit totaled \$13,941.**



## FINANCIALS

### Note 4 - Investments

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

ENDOWMENT FUNDS	<u>Fair Market Value</u>
Community Foundation of the Lowcountry	\$ 106,523
Clarece Walker Legacy Fund, Community Foundation. Lowcountry	5,517
General Fund, Coastal Community Foundation	486,347
Camp St. Mary Fund, Coastal Community Foundation	134,528
Clarece Walker Legacy Fund Fund, Coastal Community Foundation	<u>200,806</u>
<b>Total</b>	<b>\$ 933,721</b>

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)	25%	0%
International Equities (Global)	15%	57%
Hedge and Private Equity Funds	10%	0%
Fixed Income	20%	18%
Natural Resources	0%	0%
Real Estate	0%	0%
Diversifying Absolute Return	10%	10%
Real Assets	10%	15%
Emerging Markets	<u>10%</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	138,450
Total	<u>\$ 408,718</u>
Accumulated depreciation	<u>(192,836)</u>
Total property and equipment	<u>\$ 215,881</u>

### Note 6 – Unrestricted net assets

Unrestricted net assets of the United Way of The Lowcountry, Inc. at December 31, 2014, are summarized as follows:

Currently unrestricted	\$ 179,565
Reserve Fund	240,823
Board designated for endowment	<u>535,245</u>
Total unrestricted net assets	<u>\$955,633</u>

## 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, 2014 are as follows:

Beaufort Jasper Active Adult Challenge	\$ 43,270
Together For Beaufort Report Fund	40,703
Publix Emergency Fund	21,966
Operation Holiday Heroes Escrow	7,583
CareCore Help Fund	3,901
Endowment Printing Escrow	3,253
Grant Sheldon Escrow	3,627
WLC Removing Barriers Escrow	2,783
Benevolence / Assistance Funds	2,544
Eat Smart Move More Lowcountry	1,784
Early Readiness T/B Objective	1,133
Cancer Fund	<u>362</u>
 Total temporarily restricted net assets	 <b><u>\$ 132,909</u></b>

### Note 8 – Permanently restricted net assets

Permanently restricted net assets of \$277,498 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!



United Way of the Lowcountry, Inc.

Thanks to your support, the 2014/2015 campaign year was successful not just on a monetary level but, more importantly, on 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 leading 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!



**ADVANCING EDUCATION  
INCOME AND HEALTH**