

2017-2018 Annual Report
United Way of the Lowcountry



UNITED WE WIN.

UNITED WE WIN.

We are grateful for the support and generosity of all those who donated to this year's Annual Campaign. Our campaign is not about the dollars we raise, but rather the impact those dollars will make in our community. With your support, we will continue our work to improve the lives of our neighbors and build a stronger community.

The challenges facing our community are complex and need to be addressed at the roots. Through Community Impact, we are continuing to help meet the immediate needs of our neighbors through grants to agencies and through direct services like our HELPLINE and Read Indeed while at the same time, diligently working to reduce future needs by addressing the root causes of key issues, focusing on four priority areas: Basic Needs, Education, Health and Income/Family Stability.

This year we received over 1526 calls for assistance through our internal HELPLINE. Of those, 2,566 referrals were provided to those callers to agencies, helping those in need, 470 cases were provided in-depth advocacy and in 129 cases, direct assistance was provided to those in danger of falling through the cracks.

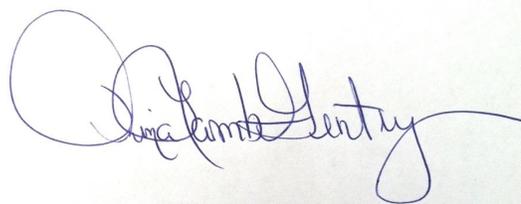
United Way's Early Grade Reading initiative, Read Indeed, continues to succeed and expand producing measurable results and outcomes. This past year, more than 275 volunteer tutors and AmeriCorps members helped 789 students in 12 schools and sites throughout both counties. Last year, of the 474 kindergarten through 3rd grade students in the program who were tested, 98% in both Beaufort and Jasper County Schools increased their reading test scores.

Thank you for your continued support. It takes all of us working together to make a difference and we thank you. UNITED WE WIN.

Kind Regards,




Jon Rembold
2017-2018 Board Chairman




Tina Gentry
President & CEO

2017-2018 Annual Report

MISSION

United Way of the Lowcountry's mission is to mobilize resources to solve human problems.

VISION

United Way of the Lowcountry's vision is 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

United Way of the Lowcountry has deep roots in this community, dating back to the 1950's. Throughout the years, the organization leveraged the collective generosity of our region and beyond in order to serve those most in need in our community.

Over time, we found that in order to create positive, lasting change 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 assessments and outcomes process, within the best agencies was not enough to create significant sustained change in Beaufort and Jasper Counties.

The challenges facing our community are complex and need to be addressed at the roots. With this knowledge, we implemented the Community Impact model. The foundation of Community Impact is a call to action to create lasting, positive impact in the areas of Basic Needs, Education, Health and Income/Family Stability.

Through Community Impact, we are continuing to help meet the immediate needs of our neighbors through grants to agencies and through direct services like our HELPLINE, while at the same time, diligently working to reduce future needs by addressing the root causes of those key issues in our community.



COMMUNITY IMPACT

Ogre Story:

One morning, a villager decided to walk along the river on her way to work. As she was enjoying the view she noticed a crying infant in the river. Horrified by the sight of a helpless child in such a dangerous predicament, the villager dove into the water, grabbed the baby, and brought him ashore; the baby, although afraid and soaking wet, was fine. With a sigh of relief, the villager looked out on the river. "What if I hadn't seen him," she thought to herself.



As she tried to warm the baby with her jacket, she heard more crying. She looked out over the river only to see another baby in the water. Once again, she dove into the water and rescued this baby. Not a minute had passed before she heard more crying, and looking out over the river, she spotted dozens more babies.

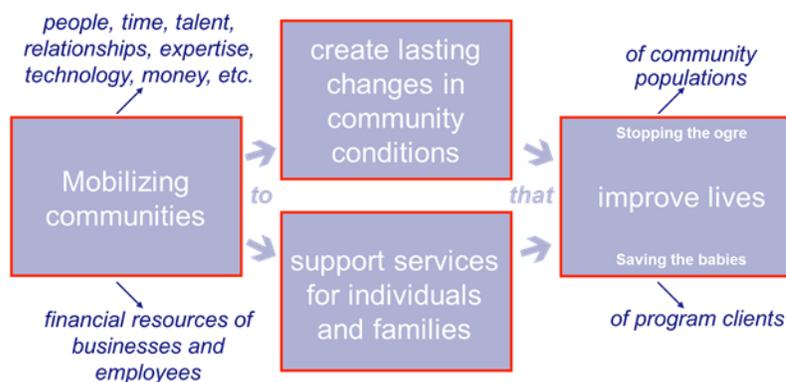
Calling out for help she was soon joined by the entire community and together they rescued as many babies as they could. But the babies kept on coming... after half-an-hour or so, a group of villagers decided to go upstream to find out why the babies were in the river in the first place. Upstream, they found an ogre tossing babies into the water!

The villagers quickly realized that the only way to keep the babies safe was to deal with this ogre. But pulling the babies out of the river is also essential. How could they live with themselves if they didn't try?

So what's the moral of the story? That communities must come together to mobilize short-term and long-term solutions in order to create lasting change.

- When the villager called her neighbors to the river, she mobilized community.
- By pulling the babies out of the water, the villagers were addressing the immediate need.
- And by going upstream and confronting the ogre, the villagers were able to address the root cause of the issue.

Creating lasting change is what United Way of the Lowcountry endeavors to do. To achieve this goal we know we must address immediate needs and focus on "keeping the babies out of the river" in the first place. If we don't, we will be pulling babies out of the river forever.



COMMUNITY IMPACT

Community Impact Process

The challenges facing our community are complex, and need to be addressed at the roots. With your support, United Way can continue to invest resources locally to help kids be all that they can be; to build a strong community; and to move people from poverty to possibility. But we can't do it without YOU! A total of 25 United Way donors served on 5 separate panels to review applications received in the Community Impact process.

Community Impact Committee

Chair: Becky Francis

Panel Chairs: Bill Breunsbach – Retired; April Ford – Disney Hilton Head Island Resort; Phil Kiser – Retired; Bob Norwood – Retired; Kimberly Slovenski – PNC Bank; Connie Wegmann – Retired

Program Reviewers: Carl Alston, Marge Barber, Alison Barton, Gary Bond, Kimberly Burgess, Jennifer Fisher, Matt Flewelling, Sally Fordham, Tom Hermann, Dean Hewitt, Mary Hinson, Patricia Kenworthy, Carolyn McClurg, Amber Mulligan, David Rice, Tracey Robinson, Elizabeth Siebenaler and Chip Simons.

COMMUNITY IMPACT

Community Impact Process

Electronic Application Submissions –United Way of the Lowcountry utilizes Community Force, an electronic software system to manage the application process.

Competitive Process – In order to guarantee that UWLC is funding the programs that are providing the most impact, agencies enter a rigorous process, created through the use of a phased application approach, with only the top programs making it to the final review phase.

A weighted scoring metric assists in making a largely subjective process able to become quantifiable. The reviewer does not know the overall program score until the review is done and they cannot view other panel members' scores until the final discussion takes place. This prevents biases or undue influences by other reviewers.

Tracking Common Indicators – A series of work sessions were held with partner agencies and other community stakeholders to create common key performance indicators (KPI's) that are being used to track how United Way funding is impacting our priority areas of Basic Needs, Education, Health, and Income/Family Stability.

Staggered Funding Schedule –With the change to a two-year funding process, it provided the opportunity to implement a staggered funding schedule, which 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.

This 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.



The following organizations and programs were provided financial support through Community Impact.

	Organization/Collaborative Name	Program Name
 Basic Needs	Agape Family Life Center, Inc.	Carolina Feed the Hungry
	Consumer Credit Counseling Services (CCCS)	Mortgage Assistance
	Child Abuse Prevention Association (CAPA)	Foster Home Licensing
	Hopeful Horizons	Domestic Violence Emergency Shelter
	Community Service Organization (CSO)	Charitytracker
	Family Promise of Beaufort County	Family Shelter Program
	HELP of Beaufort	Housing Stability
	Hilton Head Island Deep Well Project	Client Rent and Mortgage Payment Program
	LowCountry Habitat for Humanity	Family Home Ownership Program
	Second Helpings	Second Helpings
	The Salvation Army	Emergency Rental Assistance

	Organization/Collaborative Name	Program Name
 Income/Family Stability	Child Abuse Prevention Association (CAPA)	Parent Aide Home Visitation Program
	Consumer Credit Counseling Services	Financial Stability
	Consumer Credit Counseling Services	Student Financial Success
	Consumer Credit Counseling Services	Economic Empowerment
	Lowcountry Legal Volunteers	Financial Freedom for Families
	Programs for Exceptional People (PEP)	Adult Vocational Rehabilitation
	Wardle Family YMCA	Discovery Kids Preschool Program

	Organization/Collaborative Name	Program Name
 Education	AMIKids	Educational Program
	Bluffton Self Help	Educational Assistance Program
	Born to Read	Born to Read
	Boy Scouts	Lowcountry District - BSA
	Boys and Girls Clubs	Project Learn
	Boys and Girls Clubs	SMART MOVES
	Child Abuse Prevention Association (CAPA)	Prevention Awareness & Training
	Hopeful Horizons	Sexual Violence Prevention Program
	Love House Ministries	Dollar A Day Aftercare
	Love House Ministries	Summer Learning Center
	Neighborhood Outreach Connection (NOC)	Empowering Children
	THUMBS Up	Year-Round Literacy Program
	Wardle Family YMCA	Discovery Kids Preschool
	Wardle Family YMCA	Jasper Co. Summer Camp
	Wardle Family YMCA	YMCA Afterschool Camp

	Organization/Collaborative Name	Program Name
 Health	Alzheimer's Family Services	In-Home Respite
	Alzheimer's Family Services	Social Day Program
	Good Neighbor Free Medical Clinic	Free Medical Clinic
	Hope Haven of the Lowcountry	Children's Advocacy Program
	Hope Haven of the Lowcountry	Rape Crisis Program
	Ronald McDonald Charities	Dental Care Mobile
	Wardle Family YMCA	Aquatics

EDUCATION IMPACT



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. Children are learning to read until 4th grade, after that they are reading to learn. Nationally, only 33% of America's 4th graders read proficiently. Right now, only 34% of fourth graders in our state read on grade level. That

means that too many South Carolina 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 workplace.

Our goal, along with both Beaufort and Jasper County School District is to get at least 80% of our students reading on grade level by the time they reach the 4th grade.

United Way of the Lowcountry's Early Grade Reading Program, known as Read Indeed, continues to have a huge impact on the students who need it the most in our community. During our 5th year of the program, over 275 volunteers and AmeriCorps members diligently gave their time to work with 789 students one on one in pre-k and in grades K-3 in 12 schools and sites in the Lowcountry. 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 2016–2017 school year, of the 474 kindergarten through 3rd grade students in the program who were tested, 98% in both Beaufort County and Jasper County increased their reading test scores. An additional 275 pre-k students were also seen through the program. Some of our Read Indeed tutors also participated in summer reading, which included 1040 students.

Due to the program's success, Read Indeed is now in its 6th 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, United Way of the Lowcountry will research additional ways to enhance the program.

EDUCATION IMPACT

READ INDEED ● ● ●

Education Impact

Read Indeed is United Way of the Lowcountry's Early Grade Reading Initiative, offering one on one in-school tutoring for Pre-K – 3rd grade students.



Results are adding up!
% of students who increased
their reading scores

2017-2018

Elementary Schools and Sites

Hardeeville Elementary
Hardeeville Library
Hilton Head School for the Creative Arts
Joseph Shanklin Elementary
Lady's Island Elementary
MC Riley Elementary
MC Riley Early Childhood Center
Red Cedar Elementary
Ridgeland Elementary
St Helena Elementary
St Helena Early Childhood Center
St Helena Head Start

2017-2018

Education Impact Committee

Dr. Renarta Tompkins, Chair- USCB
Kelli Boniecki- TCL
Carmen Dillard- BCSD
Phyllis Doyle- Mary Kay
Tom Henz- NBSC
Ashley Hutchison- BCSD
Melissa Murray- BCSD
Dr. Laquandra Stevenson- JCSD
Kathy Sturges- Pearl Solutions, LLC
Vinnie Taylor- Southern Barrel Brewing
Marva Tigner- JCSD

EDUCATION IMPACT

UNITED WE WIN.



Angel received in-school tutoring with a trained reading tutor in 1st grade through our Read Indeed program. She gained the confidence and skills needed to improve her reading and moved up three reading levels in one year.

EDUCATION IMPACT



Reading Tutor Testimonials



“Tutoring on Wednesdays is the highlight of my week. Can't believe this is my third year. There is nothing better than helping young children increase their knowledge and self-confidence. This program needs more adults to support the kids for an hour a week to several days a week. You don't need to be a prior teacher, just a little interest can produce amazing results. Volunteer and give yourself the opportunity to improve the future of our local children. “

Steve Dickson, Coach (Read Indeed Tutor)

“I have been part of United Way's tutoring program for 7 years. It is one of the most rewarding things I have ever done. Not only do I get the opportunity to work with some very special boys and girls who are eager to learn, but I also see first hand how they grow in their abilities and confidence. It is amazing how much impact you can have from spending 40-60 minutes a week with a child. I have seen students increase their reading levels by 2 to 3 grades during a school year. The support you receive from United Way, teachers, and school staff is outstanding. You feel valued, and you have impact – not a bad combo. If you have time to volunteer, I would encourage you to become a United Way tutor.”

Patrick (Rick) McGill, (Read Indeed Tutor)

EDUCATION IMPACT

Reading Tutor Testimonials Continued

"Two days a week (unfortunately only during the school year-), I meet with the most genuine , engaging second graders I could know to share a delightful pleasure in stories and art. Thank you United Way.

Dick Stewart, Read Indeed Tutor

"I absolutely love this program and the kids I work with. I previously volunteered for many years with Born To Read, another United Way program, in which I visited mothers with newborn babies to talk about the importance of reading to your child from the very beginning. I also gave them a gift bag that reinforced this message. I always found the mothers to be very receptive to the information, and many of them had not thought about reading to their children from the beginning to help expand their vocabulary and get them interested in books.

I decided to join United Way's reading tutor program to help South Carolina elementary students improve their reading skills. Working with the second grade students at Ladys Island Elementary has been a wonderful experience. I find the children are enthusiastic to improve their reading skills and they enjoy being challenged to try books that are often above the level they achieved in testing. One of the teachers told me to try levels F and G when working with one of her students because she didn't like to read. This was in September. She is now reading chapter books at the M level. Initially she didn't like to read and now she tells me she reads a lot at home as well. I have seen a lot of improvement in my students, which is very gratifying.

Hats off to Bethany Marcinkowski who is in charge of this terrific program. She organizes our schedules, trains the volunteers and supports them throughout. I know she probably does much more, but she has organized a great program and deserves a lot of credit.

Dianne Stewart, Read Indeed Tutor

AMERICORPS



AmeriCorps members collaborated with United Way of the Lowcountry Partner Agencies for National Day of Service.

In the 5th year partnership with AmeriCorps, 28 AmeriCorps members participated and continued to provide a needed infusion of stability by serving as reading tutors in the “Read Indeed” program.



HELPLINE

- **1526** calls were received / **545** cases were actual face to face visits into the Beaufort office requesting help.
- Provided **2566** referrals to various health and human service agencies in our county.
- Provided **470** cases with in depth advocacy services.
- UWLC provided **\$35,829.17** in direct financial assistance to **129** cases where the caller was in danger of falling through the gaps in our current social service network.

Top Requests Received :

Utilities

Home repairs

Food

Rent

Emergency Housing/Hotels

United Way of the Lowcountry's HELPLINE assists people right here in our community like Shelia. She has donated to United Way of the Lowcountry in the past through her campaign at work but never imagined she would be on the receiving end. However, this past spring she was faced with an unexpected surgery, which put her out of work for a month. While she recovered from surgery, the HELPLINE provided support services to assist this proud grandmother with the basic essentials she needed during a difficult time in her life.

Through United Way of the Lowcountry's partnership with the Catholic Heart Work Camp, Shelia also received assistance with minor repairs and maintenance to her home.



"I have always believed that what you make happen for someone else, God will make happen for you. I didn't know when I donated to help meet the needs of others that it would end up helping me but it was a blessing and I appreciate it." - Shelia

WOMEN UNITED

**LEADING
THE CHARGE
INSPIRING
THE CHANGE**



Women United harnesses the power and dedication of women to engage, educate and empower others to become leaders and actively participate in the betterment of our community.

Through proceeds from Women United's Power of the Purse fundraiser, Women United supports the Breaking Barriers to Education Fund and Operation Backpack. This Breaking Barriers to Education Fund seeks to help fulfill needs that would otherwise prevent a student from attending school or from reaching their full potential. The 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.

Women United also holds quarterly workshops and networking events.

WOMEN UNITED



**LEADING THE CHARGE
INSPIRING THE CHANGE**

Women United's 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.



Women United provides backpacks full of school supplies for local students through Operation Backpack. This is what we were able to do this past school year.

OPERATION BACKPACK



backpacks with
school supplies

600+



uniform shirts

1200+



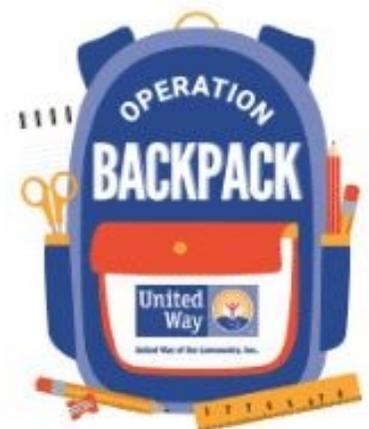
students

600+



volunteers

100+



18TH ANNUAL CATHOLIC HEART WORK CAMP



Like worker bees called to the hive, more than 350 students from across the nation visited the Lowcountry for a week during their summer break. Volunteers lent their time and talents to helping make life better for Beaufort and Jasper county elderly, disabled, and families in need.

Each summer since 1999, United Way of the Lowcountry has helped coordinate the Catholic HEART (Helping Everyone Attain Repairs Today) Work Camp. 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 by partnering with local human service agencies.

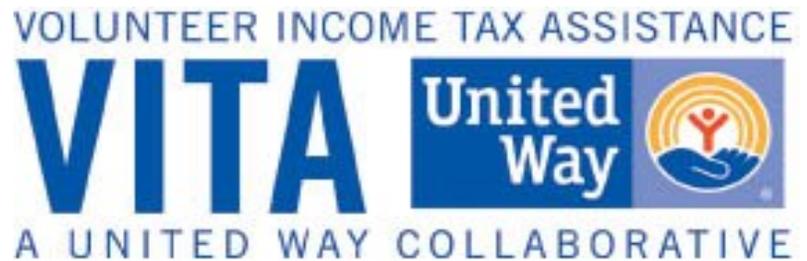
CHWC's mission is to revitalize communities and beautify homes of the elderly, the disabled and those who cannot afford needed repairs. While in Beaufort County, the campers, including 100-plus adult leaders and local volunteers, worked together on approximately 60 projects involving everything from yard work to installing handicap ramps. Thanks to donations from businesses like Glidden Paint that has donated all of the paint for this project since 1999, the United Way of the Lowcountry and Catholic HEART Work Camp were able to address pressing needs in our community.

For one week each June, over 300 teenagers and 150 adult leaders provide help and service to more than 50 residents in Beaufort and Jasper counties. We look forward to partnering with Catholic HEART Work Camp again this year.

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 will prepare more than 2,100 tax returns in 2018 for low-income, elderly, and differently abled individuals and families in the Lowcountry. Each year since 2008 the VITA program has been returning millions of dollars to the pockets of local residents and saving hundreds of thousands 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, 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

2017-2018



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Chair Elect

Katie Phifer

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Dr. Renarta Tompkins

Secretary/ Education Impact Chair

Becky Francis

Community Impact Chair

Peter Post

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Alison Barton

Gale Brown

Bobby Burnett

Avery Cleland

Phyllis Doyle

Marty Gleason

Larry Herlong

Chris Ketchie

Kim Malphrus

Michael Nix

CORPORATE AND INDIVIDUAL SPONSORS

Ameris Bank
 Amy Bowman State Farm Agency
 Avery Cleland
 Beaufort Memorial Hospital
 BJWSA
 CBW Bookkeeping Services, LLC
 Charlie & Becky Francis
 Cleland Site Prep
 Dataw Island
 David House
 Dividend Assets Capital, LLC
 EEC Irrigation
 Gexpro
 Greenville Turf & Tractor
 Hargray
 HH Insurance Brokerage
 Kinghorn Insurance
 Lane Construction
 Lowcountry Insurance
 McDonalds
 Justin Neumann
 Katie C. Phifer, CFP—Bezilla Kinney
 Wealth Management Group, Wells Fargo
 Advisors
 Malcolm Goodridge

Murr Printing
 OneBlood
 Palmetto Electric
 Palmetto State
 Bank
 Phifer Contracting Services
 Pink Magazine
 Publix
 RE/MAX—Chris & Maria Skrip
 Robinson Grant & Co., P.A.
 Sea Island Grill Restoration Services
 Secession Golf Club
 SERVPRO of Beaufort County
 SF Jenkins Interiors, Inc
 Show Turf
 Southern Tree Services
 Technical College of the Lowcountry
 The Heralds
 The Island News
 The Lane Construction Corp.
 Trevor Johnson
 Turbeville Insurance
 Turner Home Inspection Services
 White Ridgely Associates
 VinCo ATM Services



PACESETTERS

2017 Workplace Pacesetters:

ABR
 AGAPE Family Life Center
 Alpha Media
 Atlantic Community Bank
 Atlantic Ophthalmology
 American Association of Insurance
 AMKids
 AT&T – Hilton Head & Bluffton
 Bank of America
 B/J/H Comprehensive Health
 Bank of Walterboro
 BB&T
 BB&T-Carswell
 Beach Properties of Hilton Head
 Beaufort Construction
 Beaufort County
 Beaufort County Employees
 Beaufort County Schools
 Beaufort Housing Authority
 Beaufort Jasper Water & Sewer Authority
 Beaufort Memorial Hospital
 Beaufort Regional Chamber of Commerce
 Beaufort Rentals
 Bennett Law Firm, PA
 Big D's Royal Tees
 Bluffton Self Help
 BNC Bank
 Born to Read
 Boys & Girls Club of the Lowcountry
 Broad Creek PSD
 Carey and Company
 CBC National Bank
 CenturyLink
 Charter I Realty & Marketing
 – Mr. & Mrs. Dick Patrick
 – Mr. & Mrs. Andy Twisdale
 Child Abuse Prevention Association
 Clark Cramer & Frank, LLC
 Classic Consignments, Inc.
 Cleland Site Prep
 Coastal Plains Insurance-Bluffton

Coastal Plains Insurance-Hilton Head
 Community Service Associates
 – Sea Pines
 Community Service Organization
 Consumer Credit Counseling
 CPM Federal Credit Union
 D & R Auto Brokers
 D & S Heating & Cooling, Inc.
 Daniel Henderson
 Dataw Island Club
 Deep Well Project
 Department of Motor Vehicles
 – Bluffton & Beaufort
 Disney's Hilton Head Resort
 Dividend Assets Capital
 El Ranchito Restaurant
 Espy Lumber Company, Inc.
 eviCore Healthcare
 Farm Bureau Insurance- Ridgeland
 Federal Express
 Fender Law Firm
 Fiddlers Seafood Restaurant
 First Citizens Bank
 First South Bank
 First Steps
 GexPro
 Good Neighbor Free Medical Clinic
 Greenville Turf & Tractor, Inc.
 Gulf Stream Properties
 Hand & Tanner Financial Group
 Handy Dan's
 Hargray Communications
 Harris Teeter - HHI
 Harry C. Brown, Sr. Law Firm
 Harvey's Barber Shop
 HELP of Beaufort
 Hilton Head Island
 – Bluffton Chamber of Commerce
 Hilton Head Hospital
 Hilton Head Hospital Staff Association

Hilton Head Insurance & Brokerage
 Hilton Head Public Service District
 Home Goods
 Hopeful Horizons
 Interstate Land Company
 Island Packet/ Beaufort Gazette
 Jasper County Chamber of Commerce
 Jasper County Council on Aging
 Jasper County Schools
 Jasper Feed and Seed
 JCPenney
 June & Associates, PA
 Kim Malphrus Realty, Inc.
 Kinghorn Insurance of Beaufort
 Kroger – HHI & Bluffton
 Lawn Solutions
 Literacy Center
 Live Oaks Physical Therapy
 Love House Ministries
 Lowcountry Habitat for Humanity
 Lowcountry Insurance Services, Inc.
 Lowcountry Legal Volunteers
 Lulu Burgess
 Main Street Hair Design
 Macy's
 Marshall's
 McDonald's
 Merrill Lynch
 McNair Law Firm
 Minor, Haight & Arundel
 Morgan Stanley Dean Witter – HHI
 Nationwide Insurance
 NBSC a Division of Synovus Bank
 Nimmer Turf & Tree
 O.C. Welch Ford Lincoln
 Office Depot
 O'Reilly Auto Parts
 Oyster Cay Collection
 Palmetto Electric Cooperative
 Palmetto State Bank

Palmetto Veterinary Hospital
 Peters, Murdaugh, Parker, Eltzroth
 & Detrick
 Publix Super Markets
 Regions Bank
 Robert's Village Jewelers
 Robinson Grant & Company
 Rotary Club of the Lowcountry
 Salvation Army
 Sam's Club
 Savannah River Site
 Schultz Management Corp.
 Secession Golf Club
 SERVPRO of Beaufort County
 Sheffield Oil Company
 South Carolina Electric & Gas Co.
 Southern Limb and Tree
 South State Bank
 Sunset Pizzeria
 SunTrust Bank
 Target
 TD Bank
 The Greenery
 The Lane Construction Corporation
 The Town of Hilton Head Island
 Thumbs Up
 Tidelands Bank
 TJ Maxx
 Town of Bluffton
 Tupper, Grimsley & Dean, PA
 Turbeville Insurance Agency
 United Parcel Service
 United Way of the Lowcountry
 U.S. Bank
 Walgreens
 Wal-Mart
 Ward Edwards
 Wardle Family YMCA
 Wells Fargo Bank
 Wells Fargo Advisors

UNITED WE WIN.

2017–2018 CAMPAIGN COMMITTEE

Avery Cleland
Charlie Francis
Marty Gleason
Carl Kilpatrick
Kim Malphrus
Beth McCornock
Mark O’Neil
Peter Post
Sonya Reiselt
Jon Rembold
Helen Ryan
Creighton Stuckart
Marc Stuckart
Andy Twisdale
Al Wood

2017–2018 GRANTS & INITIATIVES



Agape Family Life Center (Food Pantry) 843-784-6008, www.agapeflc.org



Alzheimer's Family Services of Greater Beaufort 843-521-9190, www.afsgb.org
Counseling and caring support for Alzheimer's patients and their families



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 Bluffton 843-757-2845/ HHI 843-689-3646
Ridgeland 843-645-2323, www.bgclowcountry.org
After-school and summer programs for children



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



The Community Services Organization (CSO) is a countywide initiative that brings together government agencies, independent faith-based and nonprofit organizations in Beaufort County under the direction of a unifying authority to track emergency assistance.

2017–2018 GRANTS & INITIATIVES



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.cccsavannah.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



Family Promise 843-815-4211, 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
Provides free primary care services for low-income uninsured adult residents of Beaufort County



HELPLINE 843-524-4357
Information and referral hotline links people with services to meet their needs



HELP of Beaufort 843-524-1223, www.helpofbeaufort.org
Food Delivery program—843-252-4105, www.helpofbeaufort.org
Emergency services and healthy noon meals delivered to homebound individuals



Hopeful Horizons 843-524-2256, www.hopefulhorizons.org
(CODA + Hope Haven) merged into Hopeful Horizons—Hospital, counseling and court advocacy for child sexual abuse and rape victims as well as their families; Counseling, shelter and care for victims of domestic violence, prevention and education

2017–2018 GRANTS & INITIATIVES



Love House Learning Academy 843-525-1043, 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

Affordable housing for low income families

LOWCOUNTRY LEGAL VOLUNTEERS



Lowcountry Legal Volunteers 843-815-1570, www.lowcountrylegalvolunteers.org

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



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



United Way of the Lowcountry, Inc.

Play Partners 843-837-2000

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



Programs for Exceptional People 843-681-8413, www.pephhi.org

Empowering adults with special needs in southern Beaufort County by promoting independence and offering opportunities for social growth and maturity



Read Indeed! 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

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

2017–2018 GRANTS & INITIATIVES



The Salvation Army 843-524-3727, www.salvationarmycarolinas.org/beaufort
Food, clothing, shelter and other necessities for people in crisis or disaster



Second Helpings 843-689-3689, www.secondhelpingslc.org
Quality surplus food for organizations that serve people in need

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

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

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

STATEMENT OF FINANCIAL POSITION

AS OF 12/31/17

ASSETS

Current Assets

Cash and Cash Equivalents	\$	1,010,921
Pledges and Grants Receivables		818,924
Pre-paid Expenses		<u>1,538</u>

Total Current Assets \$ 1,831,382

Retricted Assets

Endowment Investments		<u>997,672</u>
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Total Restricted Assets \$ 997,672

Fixed Assets

Fixed assets		963,915
Accumulated depreciation		<u>(127,656)</u>

Total Fixed Assets \$ 836,260

Other Assets 173,367

TOTAL ASSETS \$ **3,838,681**

LIABILITIES & EQUITY

Current Liabilities

Agency Support Payable		1,163,297
Other Current Liabilities		<u>497,742</u>

Total Current Liabilities \$ 1,661,039

TOTAL LIABILITIES \$ 1,661,039

Equity

Unrestricted Net Assets		612,061
Board Designated Reserve		241,720
Board Designated Endowment		539,044
Temporarily Restricted Net Assets		295,977
Permanent Restricted Net Assets		<u>241,020</u>

Total Equity \$ 1,929,822

TOTAL LIABILITIES & EQUITY \$ **3,838,681**

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 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 Ameri-Corps 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 \$1,010,920 at December 31, 2017.

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	107,052
Clarece Walker Legacy Fund, Community Foundation of the Lowcountry	5,993
General Fund, Coastal Community Foundation	435,780
Camp St. Mary Fund, Coastal Community Foundation	146,475
Clarece Walker Legacy Fund, Coastal Community Foundation	302,372
Total	\$997,672

	<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%
Total	100%	100%

FINANCIALS PART VI

Note 5 – Property and equipment

Property and equipment consisted of the following:

Land and Building	645,440
Furniture and equipment	158,561
Total	\$963,915

Accumulated depreciation	127,656
Total property and equipment	\$836,260

Note 6 – Unrestricted net assets

Unrestricted net assets of the United Way of the Lowcountry, Inc. at December 31, 2017 are summarized as follows:

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

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, 2017 are as follows:

Hurricane Relief	64,495
Together for Beaufort Report Fund	116,156
Beaufort Jasper Active Adult Challenge	33,485
Publix Emergency Fund	32,456
Women United—Breaking Barriers to Education Fund	20,597
Operation Holiday Heroes Escrow	5,562
Eat Smart Move More Lowcountry	4,739
Grant Sheldon Escrow	4,040
Benevolence/Assistance Funds	2,224
Cancer Fund	374
Total	\$280,088

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!

With the community's generosity through the Annual Campaign, United Way of the Lowcountry will help improve the lives of our neighbors and our community.

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!



CONTACT INFORMATION

CONTACT

● ● ● **STAY CONNECTED**



United Way of the Lowcountry
PO Box 202
Beaufort, SC 29901

United Way of the Lowcountry, Inc.

BEAUFORT

843-982-3040
1277 Ribaut Road

HILTON HEAD / BLUFFTON

843-837-2000
10 Buckingham Plantation Drive, Suite D

JASPER COUNTY

843-645-6500
1509 Grays Highway

VISIT & FOLLOW US ONLINE

www.uwlowcountry.org

