

2008 Financials

United Way of Transylvania County, Inc.
2007/2008 Statement of Finances
July 1, 2007 – June 30, 2008
(From 990 Tax Return)

Income	
Direct Public Support	\$490,612 ¹
Indirect Public Support	50,707
Dividends & Interest	7,407
Other Income	<u>3,000</u>
Total Income	\$551,726
Expenses	
Program Services	\$432,392 ¹
Management & General	74,323
Fundraising	29,441
Payments to Affiliates	<u>2,908</u>
Total Expenses	\$539,065
Excess or (deficit) for year	\$15,629
Net Assets or fund balances (6/30/08)	\$319,625

Note 1: Includes \$117,406 in value of Donated Services-Volunteers in Income and Expenses

2008 Board of Directors

Officers:

President	Janet Grey
1 st Vice-President	Joe Jackson
2 nd Vice-President	Fred Durand
Treasurer	Peter Johnson
Secretary	Steve Pulliam
Recording Secretary	Dian Brewton
Past President	(Open)

Directors by Terms (by last year of term):

2008	Dian Brewton	Fred Durand	(Open)
	Carson Griffin	(Open)	Rodney Lockes
	Madrid Zimmerman		
2009	Gregg Condon	(Open)	Peter Johnson
	(Open)	Tanya Murray	Maureen Sieber
	Val Smith		
2010	Barbara Boerner	Joe Castro	Sally Stepp
	Tommy Kilgore	Bruce Kirkman	Scott Latell
	Doug Stachura		

Committee Chairs:

Finance	Peter Johnson
Campaign/Publicity	Madrid Zimmerman
Allocations	Joe Jackson
Governance	Fred Durand
Community Impact	Lynne Montague-Clouse
Strategic Planning	Joe Castro

2009 Board Officers and New Board

Nominees

Officers:

President	Madrid Zimmerman
1 st Vice President	Tommy Kilgore
2 nd Vice President	Peter Johnson
Treasurer	Peter Johnson
Secretary	Steve Pulliam
Recording Secretary	Maureen Sieber
Past President	Janet Grey

Class of 2011 Director Nominees:

Don Bieger	Ruth Lentz	Susan Miller
Steve Seelinger	Ella Jones	Heather Strickland
Donna Wilde		

2008 ANNUAL REPORT



UNITED WAY OF TRANSYLVANIA COUNTY

Mission Statement:

To build a stronger Transylvania by mobilizing our community to empower people to improve their lives.

Focus: Saving and changing lives through health and human services.

2008 HIGHLIGHTS

INTRODUCTION

The economic challenges confronting our nation have been felt in Transylvania County as well. Agencies have seen a dramatic increase in requests for assistance. The weakness in the economy has challenged United Way volunteers, board members and staff to focus their efforts to ensure that programs would continue to receive support even as donors were reacting to the economic downturn.

All of us at United Way are committed to the community in which we live. We are also very grateful to each of our donors and volunteers who give so generously of their time and resources. We are confident that by working together we can continue our mission of building a stronger Transylvania and empowering people to improve their lives.

There are three major components to the work of United Way of Transylvania County: Resource Development, Resource Allocation, and Community Impact. Following are highlights of accomplishments in each of these areas.

COMMUNITY IMPACT

UWTC is moving to a Community Impact model to better focus on identified issues within the county. This is an ongoing process requiring community service partners to work together to identify specific objectives and then develop strategies to meet these objectives. The goal of community impact programs is to create lasting changes in community conditions that will improve lives within whole populations.

Under the umbrella of Community Impact, UWTC also supports new, developing programs that meet the criteria of the community impact model. A small percentage of our resources are designated annually for Community Impact Initiatives. Following are initiatives/programs that UWTC has helped support this year.

▪ Affordable Workforce Housing

United Way of Transylvania County has been instrumental in providing funding and oversight to help maintain focus on this community-wide effort.

During 2008, the Workforce Housing Coalition continued work that was started following the 2007 Workforce Housing Summit. A Community Update was presented in November 2008 to outline progress achieved within the five working committees: land, government, finance, construction and communications. Much has been accomplished. Laying the groundwork for the establishment of a community land trust was a major achievement. This was a joint effort with the TC Board of Education. Working with On Track of Asheville, employer-based educational programs are being developed to address all aspects of the home buying/ownership process. The Government committee continues to work with city and county government to consider ways to stimulate the building of future workforce housing. UWTC continues to fund a part-time housing director to help provide continuity for the project. For a complete report, please visit the coalition's website:

www.transylvaniahousing.org

▪ Financial Stability Partnership

United Way of Transylvania County is taking a leadership role in developing a partnership among social service providers, financial institutions and financial advisors in providing financial education and assistance to individuals and families in Transylvania County. Effective communication among service providers is crucial to the success of this program. UWTC has funded a part-time position for a Financial Stability Director to coordinate the early stages of the program and to implement a process for more efficient communication.

▪ 211 Helpline

The 211 Helpline is a coordinated effort of United Ways and county governments of Western North Carolina including Transylvania, Buncombe and Henderson and Madison Counties. Offering a community specific database of services and resources, the helpline specialists can answer questions and direct callers to the help they need efficiently and effectively.

▪ Youth Substance Abuse Prevention

Now in its fourth year, the Community Youth Substance Abuse Prevention Coordinator, a position initially funded through a UWTC Community Impact Grant, heads this program. The goal of this initiative is to help young people make good, healthy choices in all areas of their lives, but especially when confronted with opportunities for drug, alcohol and tobacco use. Through this effort a "Too Good for Drugs" program was successfully piloted and has now been expanded to all grades K-8.

This established program is now funded through regular allocations to the Boys & Girls Club. It is a successful example of a community impact program that is addressing a community identified need and serves a community-wide population.

RESOURCE DEVELOPMENT

▪ Campaign:

The work of the United Way campaign committee begins in March continues through the following February when the Annual Meeting marks the official end of the campaign year. Throughout many months committee members focus on various aspects of the campaign; payroll, individual and leadership giving, and gifts from businesses and professionals. Ongoing communication keeps the community informed about the work of agencies, community projects, and campaign goals.

We are very grateful for the hard work of Madrid Zimmerman, Campaign Chair, her assistant, Bruce Kirkman, and Campaign Executive Don Rogers. They and their committee have worked tirelessly in an attempt to meet this year's ambitious campaign goal of \$425 thousand. Unfortunately, the final numbers reflect the reality of the current economic crisis.

As of this writing, the campaign stands at \$389,686 or 91.7% of goal. In general, payroll giving was up, but not enough to make up for reduced giving in other areas. Leadership giving (\$1,000 or greater) in all areas except payroll and corporate is down by \$16,000 or 12%; the key reason for the lower number to date. We believe this lower amount to be driven by economic pressures on our retirees, our small businesses and our professionals (particularly those tied to construction and housing

We want to specifically acknowledge the support that came through payroll campaigns, where workers shared even more of their income to help friends

and neighbors during these critical times. As of this writing, we have not heard from a number of other counties where our residents work and give back to us through other local United Ways. Even without those additional numbers, the payroll campaign is already ahead of last year by \$14,000 or 10%. In particular we acknowledge the performances of City of Brevard (249% increase), Brevard College (+158%), Transylvania County Schools (+39%), Transylvania Regional Hospital (+97%), and Transylvania County Government (+14%; seven consecutive years of increases!).

As this campaign period ends, we extend sincere thanks to everyone who contributed to the campaign and the ongoing work of UWTC.

▪ Planned Giving:

The receipt of planned gifts and endowments allows United Way to maintain a reserve fund for potential shortfalls. The economic uncertainty we are currently experiencing underlines the importance of building a reserve. The United Way office has information available to help individuals considering a charitable gift in their wills or estate plans. We would be glad to meet with you to explain why this is so important to our future

RESOURCE ALLOCATION

▪ Allocations Committee

Each year the Allocations Committee is tasked with reviewing applications for funding from agencies across the county. The process includes site visits by area councils, interviews with agency staff, assessment of program performance measures and finally recommendations to the Board for approval. In 2008, this committee under the leadership of Joe Jackson and Barbara Boerner recommended allocation of funding for 27 programs among 18 agencies. The work of these agencies covers all areas targeted by the Community Impact focus areas. The amount UWTC is able to allocate for all programs is determined by the generosity of donors and the success of the annual campaign.

United Way of Transylvania County ranks as one of the smaller groups within the national United Way of America organization, yet we have been recognized for the leadership we have shown in adapting to change as we seek to advance the common good for everyone in our area. We are fortunate to have an exceptionally talented and dedicated Board of Directors and an Executive Director who continually strives to be proactive in forging partnership to identify and address community concerns. If we "Live United" and work together, we will conquer the challenges of today and be prepared to welcome the opportunities of the future. Thank you for helping!

Janet Grey
UWTC Board President

Steve Pulliam
Executive Director