

ADVANCING EDUCATION
INCOME AND HEALTH



NURTURING HOPE FOR BRIGHTER FUTURES 2013 ANNUAL REPORT

GIVE. ADVOCATE. VOLUNTEER.

United Way of Greater Lafayette

www.uwlafayette.org



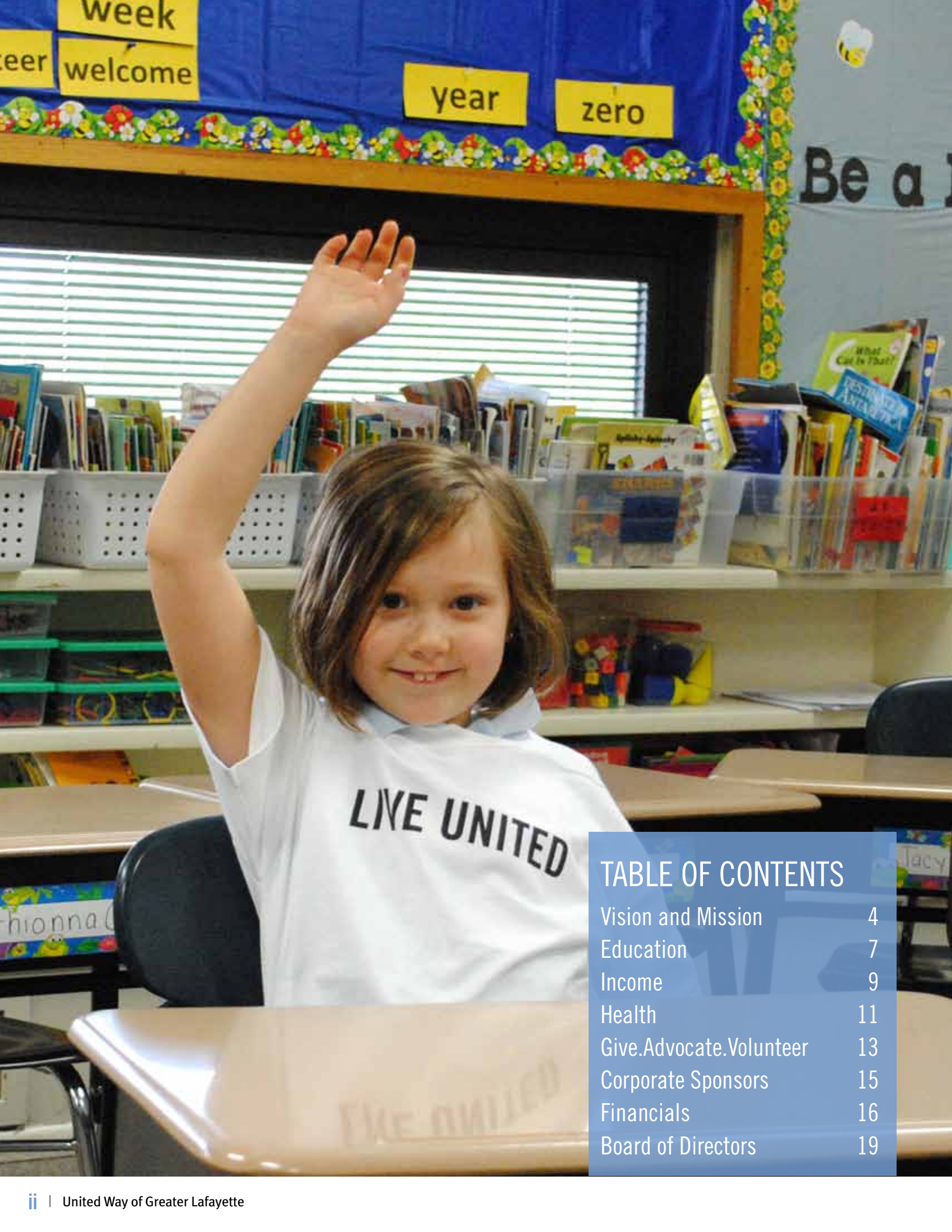


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Dear Supporters,

We celebrated our 90th anniversary with you in 2013. United Way has come a long way since a group of community leaders brought the Community Chest concept to Greater Lafayette and raised \$23,000 to address local needs. Throughout our history, United Way of Greater Lafayette has sought to effectively leverage the strengths and opportunities available here to best improve lives. We are pleased to say that 2013 was no exception.

Because of your generous support, we celebrated another victorious campaign. We met our \$4.9 million goal, and your donations will continue to provide critical funding to foundational social service agencies in our community for the coming year. This total also places us on track to continue as the third largest United Way campaign in the state behind Indianapolis and Fort Wayne, and per resident, your generosity ranks second highest in the state.

In Greater Lafayette, we are fortunate that our community managed the challenges of the last five years better than many others. However, this reality will likely limit the financial support we receive from government and foundations outside our area. Fortunately, we have social capital and local leadership that provide us with opportunities to solve our own problems. Just as we have weathered challenges in the past, this great community will continue to move forward because we have the courage to hold on to those values that make us great, while we adapt to the realities we face.

Your United Way has leaned into this challenge by developing initiatives that build on our history while broadening our impact. Our Volunteer Income Tax Assistance (VITA) program saw tremendous growth as we partnered with Ivy Tech Community College and benefited from volunteers from Purdue University's Krannert School of Management. Our VITA volunteers served 906 clients who benefitted from refunds and savings on tax preparation totaling more than \$1.5 million.

Growth continued in our education work. Kindergarten Countdown Camp expanded to 8 classrooms and provided nearly 170 children with a jump start on school, including a 15 percent increase in early literacy skills and big leaps in development of the non-cognitive skills needed to be successful in kindergarten. Finally, our collective impact work with Greater Lafayette Commerce and the three public school corporations, Read to Succeed, expanded to 15 elementary schools with 525 volunteers. Notably, the schools have provided evidence that the work of these volunteers is contributing significantly to improvement in third grade reading skills in the community.

These initiatives have filled gaps in the ways we improve lives and have proven to be low-cost as well. Creativity and courage are two assets that we will continue to leverage so that the resources you so generously give to the United Way create the maximum impact. If our progress in 2013 is any guide, we believe that we have a great deal to look forward to in 2014 and beyond.

Sincerely,



James Taylor
Chief Executive Officer
United Way of Greater Lafayette



Bob Falk
President, Board of Directors
United Way of Greater Lafayette

VISION

United Way of Greater Lafayette will add value to Tippecanoe County by enabling people to help one another.

Imagine a community that fosters hope and opportunity for everyone. A community where...

All children receive a **quality education** that offers a pathway to a brighter tomorrow.

The cycle of poverty and financial insecurity ends, and **productive livelihoods** begin for even the most disadvantaged.

Everyone has access to **healthy lifestyle options** that improve quality of life.

EDUCATION. INC.



MISSION

Mobilizing our community to improve lives.

To do this we will...

Lead the community effort to identify needs, create awareness, educate the public and impact change.

Inspire and mobilize people to invest their time and talents to meet the needs of our community.

Inspire and mobilize people to provide the financial resources necessary to improve lives.

Facilitate partnerships to eliminate educational barriers to lifelong success.

Provide for basic emergency needs, while ensuring resources are available to teach and foster long-term financial stability.

Provide access to health and wellness services, while fostering the adoption of healthy lifestyles.

COME. HEALTH.





IMPROVING LIVES

IMAGINE A COMMUNITY THAT FOSTERS HOPE AND OPPORTUNITY FOR EVERYONE.
A COMMUNITY WHERE ALL CHILDREN RECEIVE A **QUALITY EDUCATION** THAT
OFFERS A PATHWAY TO A BRIGHTER TOMORROW.

United Way of Greater Lafayette is working at critical points along the school spectrum to ensure the academic success of youth. Individuals are engaging to support youth by volunteering and championing the cause of education, creating hope and opportunity for youth who are better prepared to succeed.

Read To Succeed is a volunteer program that allows members of the community to spend one hour per week in local classrooms helping children develop and enhance their literacy skills. It is a community initiative led by United Way of Greater Lafayette, Greater Lafayette Commerce and all three local school corporations designed to motivate our community to engage in our students' academic success.

This program gives community members the opportunity to become directly involved in student achievement. We know that early grade reading skills are a key factor in academic success and high school graduation rates. Poor reading ability during the early grades is clearly linked to high school dropout rates. Students who are not proficient readers in the early grades do not typically catch up. In later grades, as coursework gets harder, reading becomes more challenging, and students have difficulty keeping up. This can lead to course failure, disengagement from school, and eventually dropping out.

With more than 525 volunteers in 15 schools, Read to Succeed touched the lives of approximately 4,400 students in Tippecanoe County in 2013.

Kindergarten Countdown Camp is a free summer camp designed to prepare children with little-to-no preschool experience for their new roles as kindergarten students. United Way, with financial and human resource partners from IU Health Arnett, piloted this program at Miller Elementary School during summer 2011.

During Kindergarten Countdown Camp, students learn the routines and procedures of kindergarten to help them successfully transition into school. The camps are taught by licensed, experienced teachers, and take place in a school setting. Community volunteers also assist in classrooms, investing their time and skills to help prepare young children for school. Students attend for a half-day, and eat free, healthy meals, and are provided with transportation to and from school via bus each day. Local students also receive a book for every day they attend camp along with a book bag and school supplies to get them started out right to kindergarten.

Kindergarten Countdown Camp has grown each year, thus preparing more children to start school ready to learn. By 2013, nearly 180 students participated in Kindergarten Camp, and 99% of parents surveyed reported that they felt their child was better prepared for kindergarten because of camp. We commend the dedication of Kindergarten Countdown Camp staff in getting children to ready for school.



MOBILIZING COMMUNITIES

IMAGINE A COMMUNITY THAT FOSTERS HOPE AND OPPORTUNITY FOR EVERYONE.
A COMMUNITY WHERE THE CYCLE OF POVERTY AND FINANCIAL INSECURITY ENDS,
AND **PRODUCTIVE LIVELIHOODS** BEGIN FOR EVEN THE MOST DISADVANTAGED.

United Way of Greater Lafayette understands the local landscape and is working with individuals, employers and local officials to create a stronger community. Through our efforts, individuals are seeing success and our community is being impacted by improved financial stability.

Volunteer Income Tax Assistance is a federal program that offers free tax preparation in our community for people with low- to moderate-incomes (below \$50,000). VITA is administered locally through a partnership with United Way and Ivy Tech Community College, which also benefits from volunteers from Purdue University's Krannert School of Management. Between January 15 through April 15, VITA volunteers assist taxpayers by filing client returns, allowing them taking advantage of the tax credits and exemptions for which they qualify.

The VITA program has grown substantially each year, and program developments have been included which improve the client experience. Working with Ivy Tech, VITA volunteers were able to offer weekday, weekend, and evening appointments to better assist clients. In 2013, there were more than 45 active volunteers working at four sites in Tippecanoe County. Those volunteers served 906 clients, a 346% increase from the previous year. Because of their efforts, VITA clients received a combined total of \$1,365,234 in refunds and saved \$136,000 in tax preparation charges.

Additionally, VITA clients were pleased with the results they received through the program. In a follow-up client survey, 99 percent felt appointments were easy to schedule and that their experience was either excellent or good. 98 percent of clients felt the program was beneficial.

Bank On Tippecanoe was launched in March 2011 as a full-scale initiative by United Way. This program is an effort to help "unbanked" and "under-banked" Hoosiers find and secure free or low-cost checking accounts. By opening checking accounts, previously unbanked and under-banked Hoosiers can take an important step toward financial security.

Bank On Tippecanoe clients take part in a free money management class, which qualifies them to open an account at one of the program's participating banks or credit unions in Tippecanoe County. Based on U.S. Census data, it is estimated that 12,000 households in Tippecanoe County may be un-banked or under-banked. The average unbanked person spends 5% of their net income on check cashing and cashier's check fees. For a lower-to-medium income worker, this is about \$1,000 a year or \$40,000 over an average working life in fees alone. Without a bank account, these families face difficulty in building assets to achieve long-term financial stability.

Bank On Tippecanoe program participants will save hundreds of dollars in monthly check-cashing fees, begin saving for the future, establish solid credit histories, and receive financial literacy training from banking professionals along the way. Bank On Tippecanoe individuals and families now have new opportunities to put their money to work and build their financial future.



LONG-TERM SOCIAL CHANGE

IMAGINE A COMMUNITY THAT FOSTERS HOPE AND OPPORTUNITY FOR EVERYONE. A COMMUNITY WHERE EVERYONE HAS **ACCESS TO HEALTHY LIFESTYLE OPTIONS** THAT IMPROVES QUALITY OF LIFE.

United Way of Greater Lafayette understands the socioeconomic factors that influence health outcomes. Through improved individual awareness and information, United Way of Greater Lafayette is helping individuals in our community improve their health. By having the community engage, mobilize and volunteer around health issues, we're working to improve maternal health and infant well-being; expand basic healthcare and support healthy lifestyles for youth and adults.

Healthy Active Tippecanoe reconvened in 2013 as a collaborative effort of United Way and representatives from the Chamber of Commerce and a diverse cross section of community groups and concerned residents from Tippecanoe County in response to local health assessments and a needed call to action. According to the Centers for Disease Control, childhood obesity has more than doubled in children and tripled in adolescents in the past 30 years.

As a leader in community change, Healthy Active Tippecanoe is all inclusive, inviting and supports community-based collaboration. Healthy Active Tippecanoe focuses on making our community a better place to live, work and play, having adopted the community vision that all children in Tippecanoe County will be physically fit through healthy eating and regular physical activity. Many children in the Greater Lafayette community are on a path to long-term consequences related to obesity, such as diabetes and cardiovascular disease. HAT seeks to encourage children in Tippecanoe County to *Eat Better, Move More!*

Through several HAT-sponsored local events and programs, we are improving access to physical activities and healthy meals, and promoting healthy behaviors. United Way is excited to team with HAT to increase the overall health of our community.

FamilyWize is a prescription drug discount program that works with United Ways and pharmacies all across the United States to distribute prescription drug discount cards to people in need. The cards are free and there are no forms to fill out, no waiting period, or registration. The card is just like a reusable prescription coupon on all FDA approved medicines.

In 2013 Tippecanoe County residents made 9,611 claims, and saved \$133,365 on their prescription medications just by presenting their FamilyWize cards when paying for their prescription medications.

FamilyWize cards are available at United Way of Greater Lafayette office, participating organizations, Payless and Marsh Pharmacies, the Fairfield Township Trustees office and online.

Operation Fit Kids is a seven-lesson module developed for grades 3 - 5. The program teaches participants about the importance of a healthy and active lifestyle. Each lesson includes information about physical fitness and healthy food choices and is designed to educate and empower youth to make healthier lifestyle choices. Each child in the program receives healthy snacks, a pedometer or a jump rope to encourage physical activity outside the program and informative handouts that can be shared with the family.

In 2013, United Way teamed with the Bauer Community Center's after school program and the YWCA's Spring Break program to present this weekly, one-hour program to more than 20 children.



LIVE UNITED

IMAGINE A COMMUNITY THAT FOSTERS HOPE AND OPPORTUNITY FOR EVERYONE. A COMMUNITY WHERE EVERYONE IS PART OF THE CHANGE.

United Way of Greater Lafayette understands change isn't something that is accomplished by one person working alone. We recruit the right people and organizations from across the community who bring the passion, expertise and resources to get things done.

Give. Thanks to generous support from donors across the community, the 2013 United Way campaign amounted to \$4.9 million! It takes thousands of man-hours to raise that amount of money. Our Loaned Campaign Representatives and development associates visited more than 44 organizations and made upwards of 125 presentations explaining the importance of the work done by United Way of Greater Lafayette and our participating organizations. More information about how campaign funds were distributed is available in the financials section on page 17 of this report.

Advocate. While the United Way is often acknowledged as a fundraising organization, it's also important to note that we are a voice for greater good in our community. In partnership with Greater Lafayette Commerce and Community Commitment to Education, we are changing the community conversations about 3rd grade reading skills and early childhood education. All of us are invested in being sure kids are prepared for school and are proficient readers when they leave third grade, and Greater Lafayette is talking about the importance of this issue.

Volunteer. Our work would not be possible without volunteers. They truly Live United! Whether they are reading with a kindergartner, helping someone file their tax return or teaching a student how to be physically fit, our volunteers are actively engaged in making our community a better place to live. In 2013, there were over 1,300 United Way volunteers working in numerous agencies across Tippecanoe County.

2013 United Way Volunteer of the Year

Each year we recognize a community volunteer who stands out in the crowd. This year, we recognized Chris Ochynski, an MBA student at Purdue University. Chris contributed to United Way as a Krannert Board Fellow beginning in 2012 following his volunteer experiences with Boys & Girls Club of Lafayette and Food Finders Food Bank as an undergraduate student.



Chris Ochynski (above), 2013 United Way Volunteer of the Year.

Through his board fellowship, Chris helped United Way staff streamline project management process with an online system. His experiences as a volunteer have convinced him of the power of the United Way. Congratulations Chris, and thank you for Living United!

CORPORATE SPONSORS



Thanks to our 2013 corporate sponsors

Our corporate sponsors provide a single donation in support of United Way's 2013 special events and activities, eliminating multiple sponsorship requests and ensuring that campaign donations are used to support the community directly.

PLATINUM SPONSORS



GOLD SPONSORS



SILVER SPONSORS

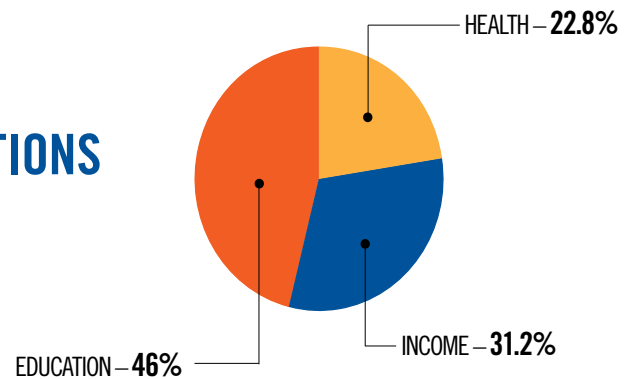


UNITED WAY OF GREATER LAFAYETTE 2013 STATEMENTS OF ACTIVITIES

	TOTAL		UNRESTRICTED		TEMPORARILY RESTRICTED		PERMANENTLY RESTRICTED	
	2013	2012	2013	2012	2013	2012	2013	2012
PUBLIC SUPPORT AND REVENUE								
Gross Campaign Results Current Year	\$ 4,903,109	\$ 4,879,040	\$ -	\$ -	\$ 4,903,109	\$ 4,879,040	\$ -	\$ -
(Less) Provisions for Uncollectibles	(258,946)	(291,946)	-	-	(258,946)	(291,946)	-	-
Prior Year Recovery for Uncollectibles	160,466	159,155	160,466	159,155	-	-	-	-
(Less) Out-of-County Designations	(359,702)	(346,512)	-	-	(359,702)	(346,512)	-	-
(Less) Amounts Designated by Donors for Member Organizations	(422,436)	(439,375)	-	-	(422,436)	(439,375)	-	-
Net Campaign Revenue	4,022,491	3,960,362	160,466	159,155	3,862,025	3,801,207	-	-
In-Kind Contributions	45,490	84,415	45,490	85,355	-	19,060	-	-
Contributions	128,355	183,337	55,754	86,755	72,601	116,582	-	-
Grants	177,665	550,912	-	-	177,665	550,912	-	-
Sponsorship Income	27,500	25,000	27,500	25,000	-	-	-	-
Interest and Dividends, Net of Investment Fees	149,574	110,953	147,591	109,645	1,983	1,308	-	-
Realized Gain on Sale of Investments	57,309	19,416	57,309	19,416	-	-	-	-
Endowment Income	19,383	18,826	19,383	18,826	-	-	-	-
Workshop Income	47,270	37,249	44,380	32,849	2,890	4,400	-	-
Service Fee Income	8,514	30,880	8,514	30,880	-	-	-	-
Net Assets Released from Restrictions	-	-	4,196,478	3,930,143	(4,196,478)	(3,930,143)	-	-
TOTAL PUBLIC SUPPORT AND REVENUE	4,683,551	5,021,350	4,762,865	4,458,024	(79,314)	563,326	-	-
EXPENSES								
Program Services--								
Gross Funds Awarded and Allocation Service Expenses	3,732,034	3,642,899	3,732,034	3,642,899	-	-	-	-
(Less) Donor Designations	(422,436)	(439,375)	(422,436)	(439,375)	-	-	-	-
Net Funds Awarded and Allocation Service Expenses	3,309,598	3,203,524	3,309,598	3,203,524	-	-	-	-
Labor Relations/Community Service	64,414	62,271	64,414	62,271	-	-	-	-
Grant Programs	668,884	614,594	668,884	614,594	-	-	-	-
Total Program Services	4,042,896	3,880,389	4,042,896	3,880,389	-	-	-	-
Management and General	172,502	174,701	172,502	174,701	-	-	-	-
Fundraising	384,308	333,391	384,308	333,391	-	-	-	-
TOTAL EXPENSES	4,599,706	4,388,481	4,599,706	4,388,481	-	-	-	-
INCREASE (DECREASE) IN NET ASSETS BEFORE UNREALIZED GAIN ON INVESTMENTS	83,845	632,869	163,159	89,543	(79,314)	563,326	-	-
UNREALIZED GAIN ON INVESTMENTS	438,465	276,562	438,465	276,562	-	-	-	-
INCREASE (DECREASE) IN NET ASSETS	522,310	909,431	601,624	346,105	(79,314)	563,326	-	-
NET ASSETS--Beginning of Year	6,575,466	5,666,035	1,748,823	1,402,718	4,822,393	4,259,067	4,250	4,250
NET ASSETS--End of Year	\$ 7,097,776	\$ 6,575,466	\$ 2,350,447	\$ 1,748,823	\$ 4,743,079	\$ 4,822,393	\$ 4,250	\$ 4,250

PARTICIPATING ORGANIZATIONS

As of December 31, 2013



	<u>2013</u>
Education	
Bauer Family Resources	\$339,633
Tippecanoe County Childcare	\$540,565
Family Services, Inc.	\$279,728
Big Brothers/Big Sisters	\$102,908
Lynn Treece Boys & Girls Club	\$220,639
Boy Scouts of America, Sagamore Council	\$81,045
Hanna Community Center	\$70,604
Girl Scouts of Central Indiana	\$37,929
	\$1,673,051
Income	
Food Finders Food Bank	\$121,000
Lafayette Crisis Center	\$103,357
LARA (Lafayette Adult Resource Academy)	\$75,507
Lafayette Transitional Housing Center	\$252,737
Meals on Wheels	\$19,578
Wabash Center	\$244,000
American Red Cross - Tippecanoe County Chapter	\$167,000
Legal Aid Corporation	\$61,153
The Salvation Army	\$88,767
	\$1,133,459
Health	
Mental Health America of Tippecanoe County	\$162,860
Riggs Community Health Center	\$169,050
The Arc of Tippecanoe County	\$32,059
The Center @ Jenks Rest	\$197,560
YWCA of Greater Lafayette	\$179,652
Lafayette Family YMCA	\$89,576
	\$830,757
Total	\$3,637,267

BOARD OF DIRECTORS



United Way of Greater Lafayette Board of Directors

BOARD OFFICERS

Bob Falk, First Vice President
Chief Executive Officer, Purdue Federal Credit Union

Jeff Kessler, Second Vice President
Co-Owner, Stall & Kessler’s Diamond Center

Jessica Rebmann, Second Vice President
 Morgan Stanley Smith Barney

Jason Bricker, Treasurer
Chief Financial Officer, Kirby Risk Corporation

James Taylor,
Chief Executive Officer, United Way of Greater Lafayette

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Scott Brady, *Chief Financial Officer*
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 Alcoa, Inc.

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Lisa Fallen, *Director of Information Technology*
 Evonik Degussa Tippecanoe Labs

Cindy Murray, *Clerk*
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Jim Ogden, *Business Manager*
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 Franciscan St. Elizabeth - Crawfordsville

Mary Anne Sloan, *Managing Director, Global Affairs*
 Purdue University

Erika Steuterman, *U.S. Air Force (Retired)*

Carlos Vasquez, *Division Director, Radiology Services*
 St. Elizabeth Regional Health

Randy Williams, *President & Chief Executive Officer*
 Lafayette Savings Bank

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Al Gatmaitan, Campaign Chair
President & CEO, IU Health Arnett

Perry Schnarr, Labor Participation Committee Chair
 Fairfield Manufacturing/UAW Local #2317

Tom Murtaugh, Immediate Past President
Assistant Vice President, Lafayette Savings Bank

Brenda S. Wallar, Marketing/PR Committee Chair
Director of Stewardship, Purdue University

Katy Bunder, Participating Organizations’ Group Representative
Executive Director, Food Finders Food Bank

United Way of Greater Lafayette

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