2017 ANNUAL REPORT
& 2018 CAMPAIGN KICKOFF

River Region United Way
95 Years Serving Our Communities

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
<th>Number</th>
<th>Cumulative Support</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1987</td>
<td>local Tocqueville Society founded</td>
<td>21</td>
<td>$19.1 Million</td>
<td>44</td>
</tr>
<tr>
<td>1953</td>
<td># of Affiliate Agencies in 1953</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1923</td>
<td>First Campaign</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1970</td>
<td>First year United Way exceeded $1,000,000</td>
<td>77</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1923</td>
<td>First time the organization changed name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1923</td>
<td>Estimated cumulative giving since 1923</td>
<td>$214.5 Million</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1923</td>
<td># of Affiliate Agencies since inception</td>
<td>95</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1923</td>
<td>Original number of Affiliate Agencies</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td># of Affiliate Agencies in 2007</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Continuously-served Affiliate Agencies since inception</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Number of Tocqueville Society Members today</td>
<td>165</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Ninety-five years in continuous service to the River Region is an achievement that is not possible without the tireless efforts of thousands of people across our communities committed to making life better for everyone. Everyone deserves opportunities to have a good life, a stable job and a quality education. We should teach and empower others to help themselves. Like our grandfathers, we believe we should treat everyone as we would a neighbor. And yet while United Way has been around since our grandfathers were born, we are no longer our grandfather’s United Way.

Traditionalists serve in key positions of leadership and comprise our donor base. In short, River Region United Way looks like the community we are trying to serve.

While we may all agree that we should give back to our community, a one-size-fits-all approach just doesn’t cut it anymore. That’s why our assessment work is so important. If you’re going to fix the most pressing problems facing a community, you’d better know what those problems are. Then, we can engage networks, recruit volunteers, build corporate partnerships, inspire and connect with donors to support our work financially through our annual campaign. In short, we acquire the resources necessary to carry out our mission.

What makes United Way unique is our ability to nurture networks of nonprofits and collaborate rather than compete with our peers. We focus not only on our work, but also on the relentless pursuit of results through the 90+ programs we fund at more than 40 local nonprofits. We allocate funds to programs based on evidence, facts and results, because positive outcomes create changed lives and opportunities for everyone.

For the first time, a Millennial is chairing our Board of Directors. Many Baby Boomers fill staff and volunteer leadership roles. Gen X’ers and Traditionalists serve in key positions of leadership and comprise our donor base. In short, River Region United Way looks like the community we are trying to serve.

For the first time, five generations are working side-by-side in our communities. While this poses some challenges, it brings a rich diversity of perspectives, skills and ideas, and also provides opportunities to rethink our work and the expectations we have about serving our community.

Lastly, we hold ourselves accountable for our investments in the community. Learning by using data to evaluate program progress, we challenge our own assumptions and improve our ability to positively impact more lives in the communities we serve.

Successful organizations work with and through others to create greater impact than they could ever achieve alone. Our vision for the next 95 years is one where the solutions we create for communities go beyond short-term charity for a few and, instead, translate to a safer, healthier and more prosperous River Region for everyone.

A River Region where, together, we all fight for the health, education, financial stability and basic needs of every person in every community. Like our grandfathers believed, we rise and fall together. Join us in this important work. Together, let’s LIVE UNITED.

Our Mission
To advance the common good by uniting volunteers, donors and community partners to improve the quality of life in the River Region.
Thank you to our 2017 Campaign Volunteers who helped raise $4,246,711.

Thank you for helping make life better for everyone in our communities. Funds raised will support programs focusing on health, education, financial stability and basic needs, directly impacting 1 in 3 people in the River Region.

Members of the 2017 Campaign Cabinet

Thank you!
2017 Membership

Ordre de Fraternité
Mr. & Mrs. James K. Lowder*

Ordre de Liberté
Mr. John A. Caddell

Membres de la Société
Anonymous
Mr. & Mrs. Charles E. Adair
Mr. & Mrs. Samuel Adams
Mr. & Mrs. John N. Albritton, Jr.
Mr. & Mrs. J. Greg Allen
Mr. Jake F. Aronov
Mr. & Mrs. Owen W. Aronov
Dr. & Mrs. Ronald T. Barganier
Mr. & Mrs. Rocky Barnes
Dr. & Mrs. Sanders M. Benkwith
Mr. & Mrs. Young J. Boozer, III
Mr. & Mrs. David G. Borden
Dr. & Mrs. Arthur M. Britton
Ms. Cathy Caddell & Mr. Charlie Warnke
Mrs. Dorothy D. Cameron
Mr. & Mrs. George B. Clements
Mr. & Mrs. E. L. Crane
Ms. Elizabeth B. Crump
Dr. & Mrs. Benjamin J. Cumbus
Dr. & Mrs. Stephen L. Davidson
Mr. Morris Dees & Mrs. Katie Kalahar
Mr. & Mrs. Chris A. Dubberly
Mr. & Mrs. C. Lee Ellis
Mr. & Mrs. Barrie H. Harmon, III
Mr. & Mrs. W. Inge Hill, Jr.
Mrs. Truman M. Hobbs, Sr.*
Mr. & Mrs. Bill Jackson
Mr. & Mrs. John Mike Jenkins, IV
Mr. Keith Karst & Dr. Mary Karst
Mr. & Mrs. Thomas H. Keene
Mr. & Mrs. Knox Kershaw
Mr. & Mrs. James E. Klingler
Mr. & Mrs. Richard L. Kohn
Mr. & Mrs. Jerry C. Kyser, Sr.
Dr. & Mrs. Mark H. LeQuire
Mrs. Mary Lynne Levy
Mr. & Mrs. James L. Loeb, Jr.
Mrs. Joan B. Loeb*
The Doctors Lorino
Mr. & Mrs. Michael H. Luckett
Mr. & Mrs. Hans Luquire

Mr. & Mrs. Forrest McConnell, III
Mr. & Mrs. William McConnell
Mr. and Mrs. Purser L. McLeod, Jr.
Mr. & Mrs. Ted G. Meadows
Mr. & Mrs. Thomas J. Methvin
Mr. & Mrs. E. Temple Millsap, III
Dr. & Mrs. William J. Mitchell
Dr. & Mrs. John Moorehouse
Mr. & Mrs. Maurice D. Mussafer
Mr. & Mrs. Larry D. Puckett
Mr. & Mrs. Bruce S. Reid
Mr. & Mrs. Jim L. Ridling
Ms. Jane F. Rothschild
& Mr. Mario Castura
Mr. & Mrs. Robert F. Runkle
Mr. & Mrs. Steve A. Russell
Mr. & Mrs. Keith Sabel
Mr. & Mrs. S. Adam Schloss
Mr. & Mrs. Robert E. Seibels
Mr. & Mrs. Ned F. Sheffield
Mr. & Mrs. George C. Smith, Jr.
Mr. & Mrs. Richard M. Stabler
Mr. & Mrs. Charles A. Stakely
Mr. Bolling P. Starke, III
Dr. & Mrs. Karl K. Stegall
Mr. & Mrs. Eddie Stewart
Mr. Eddie Stivers & Ms. Amy Selbee
The Honorable Todd R. Strange
& Mrs. Strange
Mr. & Mrs. Jimmy M. Stubbs
Mr. Robbins Taylor, Sr.
Mr. & Mrs. Vernon B. Taylor
Dr. & Mrs. David R. Thrasher
Mrs. Helen A. Till
Mr. & Mrs. Adolph Weil, Ill
Dr. Laurie Jean Weil & Dr. Thomas Wool
Mr. & Mrs. Robert S. Weil, II
Mrs. Helen Crump Wells
Mr. & Mrs. W. A. Williamson, Jr.
Mr. & Mrs. John D. Yelverton, III

Founding Members

Carolyn & Winton “Red” M. Blount, Jr.
Mary Katherine Blount
Winton M. Blount, III
Elizabeth “Tootsie” Emmet
Mary & James Folmar
Joyce C. & Truman M. Hobbs, Sr.
Joan B. & James “Jimmy” L. Loeb
Margaret & James “Jimmy” K. Lowder
Robert “Bobby” E. Lowder
June Collier Mason
Sidney McGough
Pat & Milton McGregor
Avis Hughes McIntyre
Eunice Davis-McNeill
Carol Rothschild
Rita & Mark Sabel
Jean & Adolph “Bucks” Weil, Jr.
Virginia & Robert “Bobby” S. Weil, Sr.
Wynona & James “Jim” W. Wilson, Jr.

With deep appreciation for our Founding Members, who came together in 1987 to foster, promote and recognize the vital importance of voluntary community service and personal giving at an exceptional level.
2017 Board of Directors
As the governing board of the River Region United Way, these volunteers determine strategy and make decisions on policy and fundraising issues. In 2017, the Board continued to advance the mission and purpose of the River Region United Way. In keeping with the organization's strategic goals, the Board took steps to reduce operational overhead, protect the organization's assets, and ensure the maximum amount of dollars were used at the program level to address community needs.

Chair of the Board
Dr. Katherine J. Webb
Auburn Montgomery

Chair-Elect
Jason Goodson
W.K. Upchurch Construction Co.

Treasurer
Russell Sinco
Alfa Insurance

Holly B. Adcock
Alabama Power

Eric D. Alford
Bass Pro Shops

Hon. Deborah H. Biggers
Macon County District Court

Robert W. Birmingham
Regions Bank

Dr. Jacqueline A. Brooks
Macon Co. Board of Education

Terrie Channell
Alabama Farmers Federation

Rev. Dr. Wendy R. Coleman
ASU Department of Theatre Arts

Christine Cook
Jackson Thornton

Jack W. Daniels, Jr.
Blackburn Daniels O’Barr

Shena Davidson
Hancock Bank

Mitchell Dubina
Stifel Nicolaus & Company

Steven Fox
Publix Super Markets

Dr. Rhea Ingram
Auburn Montgomery

Hon. Adrian D. Johnson
State of Alabama
Administrative Office of Courts

Chris Lee
City of Tuskegee

Thomas L. "Lee" Macon, IV
Elmore Co. Revenue Commission

Saxon Main
Ball Ball Matthews & Novak

Clay McConnell
Alabama Power

Mark Rader
Hyundai Motor Manufacturing
Alabama

Hon. Steven L. Reed
Montgomery Co. Probate Court

Rhonda Sibley
Aldridge, Borden & Company

Ex-Officio Members:
Community Impact Council Chair
Donna Cooper
BBVA Compass

Campaign Chair
Jimmy Stubbs
River Bank & Trust

Allocations Committee Chair
Laura Chambliss
Auburn Montgomery

2017 Advisors to the Board
These volunteers share their experience and expertise by serving in an advisory capacity to assist the Board as needed.

Finance Committee: Roger Spain, Oakworth Capital Bank
Investment Committee: Andy Flowers, Starke Agency
Roger Spain, Oakworth Capital Bank
Marketing & Communications Committee:
Lisa Beers, WSFA-12 News; Ken Hare, Community Volunteer
Laura Hicks, Stamp Idea Group; Darryl Hood; Alabama News Network
Tina McManama, MacZas, LLC; Helen Taylor, Beasley Allen Law Firm

How We Work

Assess
the needs in the communities we serve

Acquire
the resources necessary to address the needs

Allocate
funds to programs that meet the needs

Account
for donations ensuring resources are used effectively and efficiently
2017 Allocations Committee

The Allocations Committee reviews funding applications from RRUW affiliate agencies, examines reports and outcomes to ensure compliance and accountability, meets with agency leadership, and recommends allocation amounts for consideration by the Board of Directors.

Chair of the Committee
Laura Chambliss  
*Auburn Montgomery*

Vice Chair
Jason K. Gardner  
*BBVA Compass*

Jennifer Asbury  
*Regions Investment Solutions*

Jay Baker  
*BBVA Compass*

Michael Bird  
*Jackson Thornton*

Wes Blake  
*Aldridge Borden & Co.*

Donna Cooper  
*BBVA Compass*

Jason A. Crutchfield  
*SummaSource*

Bonnie Evans  
*Montgomery Area Chamber of Commerce*

Keina C. Houser  
*Jackson Thornton*

Henry L. Jackson  
*Montgomery City-County Personnel*

Pamela E. King  
*VT Miltope*

Amanda Mercado  
*Alabama Board of Pardons & Paroles*

William Drew Moore  
*MAX Credit Union*

Jeremiah “Jeremy” Moreland  
*MST CPA’s & Advisors*

Daniel Oakley  
*City of Prattville*

Dawn Owens  
*Tandem Early Education Consulting*

Janice Patrick  
*Troy University Montgomery*

Steffanie Patterson  
*Alabama News Network*

Charles J. Reynolds  
*Wells Fargo Bank*

Joseph Robison  
*Guardian Credit Union*

Draper Stanford  
*Regions Bank*

Fran Taylor  
*Huntingdon College*

Clare Watson  
*City of Montgomery*

Joey White  
*Regions Bank*

Greta L. Williams  
*Alabama Department of Labor*

Tara Wizorek  
*Alabama Department of Labor*

Rodney Zeigler  
*Alabama Department of Labor*

Following the RRUW Annual Meeting on May 16, 2017, a ribbon cutting and open house was held at the United Way offices at 3121 Zelda Court in Montgomery.

2017 Community Impact Council

The Community Impact Council is charged with assessing needs in our communities – identifying acute unmet needs and the most pressing issues facing the River Region.

Chair of the Council
Donna Cooper  
*BBVA Compass*

Nakima Boleware  
*BBVA Compass*

Adam Causey  
*Jackson Thornton*

Bonnie Evans  
*Montgomery Area Chamber of Commerce*

Melanie Golson  
*City of Montgomery*

Mark Hope  
*Trustmark Bank*

MaCheá Jones  
*Alabama Dept. of Youth Services*

Lillie R. King  
*BB&T*

Cathy Martin  
*C. Renee Martin, LLC*

Steefanie Patterson  
*Alabama News Network*

Cayce Rogers  
*Troy University Montgomery*

Rodger Selph  
*Liberty Bank & Trust Company*

Patricia E. Shaner  
*Alabama Board of Medical Examiners*

Dicie Smith  
*River Bank & Trust*

Charlie Martin  
*Alabama Board of Pardons & Paroles*

William Drew Moore  
*MAX Credit Union*

Jeremiah “Jeremy” Moreland  
*MST CPA’s & Advisors*

Daniel Oakley  
*City of Prattville*

Dawn Owens  
*Tandem Early Education Consulting*

Janice Patrick  
*Troy University Montgomery*

Steffanie Patterson  
*Alabama News Network*

Charles J. Reynolds  
*Wells Fargo Bank*

Joseph Robison  
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*Regions Bank*

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*Huntingdon College*

Clare Watson  
*City of Montgomery*

Joey White  
*Regions Bank*

Greta L. Williams  
*Alabama Department of Labor*

Tara Wizorek  
*Alabama Department of Labor*

Rodney Zeigler  
*Alabama Department of Labor*

Donna Cooper, 2017-18 Chair of the Community Impact Council, tutors a student at Davis Elementary School, site of RRUW’s 2017 Day of Action and “Wild for Reading” summer camp.
Thank You to Our Top Corporate Partners

United, we fight for the health, education, financial stability and basic needs of every person in the River Region.

Alfa Insurance Companies
Publix Super Markets
Hyundai Motor Manufacturing Alabama
Alabama Power
Regions Bank
The Colonial Company
United Parcel Service
International Paper
City of Montgomery
Caddell Construction Company
Jackson Thornton
SABIC Innovative Plastics
River Bank & Trust
Montgomery Water Works
& Sanitary Sewer Board
Stifel Nicolaus
Rushton Stakely
Aldridge, Borden & Company
Warren Averett
Rheem
ServisFirst Bank
Blue Cross and Blue Shield of Alabama
Beasley Allen Law Firm
Spire Alabama
Enterprise Holdings
Aronov
Montgomery Area Chamber of Commerce
Montgomery Pulmonary Consultants
Goodwyn, Mills and Cawood
Thompson Tractor Company
BB&T

This listing reflects our Top Corporate Partners and includes corporate contributions pledged for the 2017 Campaign, as well as support from employees through workplace giving campaigns.

Thank You to Our Top Corporate Partners

United, we fight for the health, education, financial stability and basic needs of every person in the River Region.

Alfa Insurance Companies
Publix Super Markets
Hyundai Motor Manufacturing Alabama
Alabama Power
Regions Bank
The Colonial Company
United Parcel Service
International Paper
City of Montgomery
Caddell Construction Company
Jackson Thornton
SABIC Innovative Plastics
River Bank & Trust
Montgomery Water Works
& Sanitary Sewer Board
Stifel Nicolaus
Rushton Stakely
Aldridge, Borden & Company
Warren Averett
Rheem
ServisFirst Bank
Blue Cross and Blue Shield of Alabama
Beasley Allen Law Firm
Spire Alabama
Enterprise Holdings
Aronov
Montgomery Area Chamber of Commerce
Montgomery Pulmonary Consultants
Goodwyn, Mills and Cawood
Thompson Tractor Company
BB&T

This listing reflects our Top Corporate Partners and includes corporate contributions pledged for the 2017 Campaign, as well as support from employees through workplace giving campaigns.

RRUW Board Chair Katherine J. Webb shares a story with students participating in the "Wild For Reading" summer camp at Davis Elementary School.

United Way staff and 150 volunteers from 21 area businesses volunteered their time on a variety of fun reading-related activities, with the goal of decreasing “summer learning loss.” More than 1,500 books were distributed to students, many of whom may not have any books to read at home.
### Statement of Financial Position

<table>
<thead>
<tr>
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<th>2017</th>
<th>2016</th>
</tr>
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<tbody>
<tr>
<td>Current Assets</td>
<td>$5,097,406</td>
<td>$4,586,812</td>
</tr>
<tr>
<td>Other Assets</td>
<td>1,908,419</td>
<td>2,368,335</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$7,005,825</strong></td>
<td><strong>$6,955,147</strong></td>
</tr>
<tr>
<td>Current Liabilities</td>
<td>$2,585,043</td>
<td>$2,910,924</td>
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<tr>
<td>Other Liabilities</td>
<td>19,312</td>
<td>29,886</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$2,604,355</strong></td>
<td><strong>$2,940,810</strong></td>
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<tr>
<td>Net Assets</td>
<td>4,401,470</td>
<td>4,014,337</td>
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<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td><strong>$7,005,825</strong></td>
<td><strong>$6,955,147</strong></td>
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### Statement of Activities

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Public Support</td>
<td>$3,306,413</td>
<td>$3,487,824</td>
</tr>
<tr>
<td>Other Revenue</td>
<td>160,573</td>
<td>151,263</td>
</tr>
<tr>
<td><strong>Net Public Support &amp; Other Revenue</strong></td>
<td><strong>$3,466,986</strong></td>
<td><strong>$3,639,087</strong></td>
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<tr>
<td>Programs Services</td>
<td>2,381,576</td>
<td>2,387,761</td>
</tr>
<tr>
<td>Management &amp; General</td>
<td>257,999</td>
<td>522,618</td>
</tr>
<tr>
<td>Fundraising</td>
<td>440,278</td>
<td>384,355</td>
</tr>
<tr>
<td><strong>Total Programs &amp; Other Expenses</strong></td>
<td><strong>3,079,853</strong></td>
<td><strong>3,294,734</strong></td>
</tr>
<tr>
<td><strong>Increase (Decrease) in Net Assets</strong></td>
<td><strong>$387,133</strong></td>
<td><strong>$344,353</strong></td>
</tr>
</tbody>
</table>

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**Total Community Investment**

- **Financial Stability**: 19% or $424,509
- **Education**: 36% or $827,536
- 211: 8% or $175,359
- **Health**: 37% or $843,254

For complete audited financial statements, please go to RRUW.org/Accountability.

For resources distributed to affiliate agencies, go to RRUW.org/Agency-Support.

Graph excludes donor-designated contributions.
Our Campaign volunteers acquire the resources, both human and financial, required to address the needs in our communities.

This fall, under the leadership of 2018 Campaign Chair Ed Crowell, members of the Campaign Cabinet, Loaned Executives from area businesses, and Employee Campaign Coordinators will contribute thousands of hours of volunteer support to our community fundraising efforts. Their involvement broadens United Way’s reach and increases our impact throughout the River Region, helping to do what our staff alone could not accomplish.

The 2018 Campaign will include nearly 200 workplace giving and agency campaigns from throughout the River Region.

To find out more about ways your business or employer can get involved, visit us online at RRUW.org/workplace-giving. We also rely on individuals outside the workplace to make charitable donations.

To make a gift online, visit us at RRUW.org/Donate. Or you can mail a check or money order, payable to “River Region United Way,” to RRUW, P.O. Box 868, Montgomery, AL 36101.

With an outpouring of community support from people like you, nearly 135,000 individuals will benefit directly from the programs and services provided by the River Region United Way and our 40+ affiliate agencies.
Problems.
The ones most people don’t have the stomach for.
The ones nobody talks about at parties.
The ones you might think can’t be solved.
We go looking for them.
On unforgiving streets and in struggling communities,
In seemingly docile neighborhoods throughout our five-county River Region.
We identify community needs, and
We find every dollar we can to address them.
But we’re more than the fundraisers.
We are the hand raisers. The game changers.
The stop-talking-start-doing-band-together-and-take-on-the-impossible-task-masters.
United, we stand up for those needing mental health care.
United, we advocate to keep the elderly independent and in their own homes.
United, we defend children who’ve been abused or neglected.
United, we confront the struggles of families who can’t make ends meet.
We battle for all of our neighbors across the River Region.
In Autauga and Elmore counties.
In Lowndes, Macon and Montgomery counties.
No matter the obstacles. No matter the odds.
We surround a community’s most critical problems.
And we fight.
We fight for those who need a voice and those
whose names we do not know.
The River Region United Way fights for the
health, education, financial stability and basic
needs of every person in every community.
Because change doesn’t happen alone.
And hope is not a one-man band.
There is no “you” or “me.” There is only “us.”
We have one life.
To live better, we must Live United.
Make a gift to the River Region United Way and help 1 in 3 people in our community this year.

Yes, I want to make life better for everyone!

| My Total Gift: | $ __________________________ |
| Paid Now: | $ __________________________ |
| Balance Due: | $ __________________________ |

How I want to give:
- **Check** (enclosed)
  - Please make check payable to River Region United Way
- **Bill me** (Minimum total contribution of $50)
  - Quarterly
  - One time on (specify date): __________________________
- **Pay by credit or debit card**
  - Call Carson at 334-323-2547 or give securely online at RRUW.org/Donate

To designate your gift, enter the two-digit code(s) from the previous page. $48 minimum designation per agency.

Mail to: **River Region United Way** | P.O. Box 868 | Montgomery, AL 36101 | 334.264.7318