



2 • 0 • 0 • 0 • 7

Annual Report

2007-2008 Board of Directors...

OFFICERS —

Suzanne Brown, President
Tim Eymer, First Vice-President
Melinda M. Bergbom, Campaign Co-Chairman
Conley Weiss, Second Vice-President
William Abare, III, Treasurer
Jim Spaulding, Immed. Past President

EXECUTIVE COMMITTEE MEMBERS —

(in addition to the officers)

Cecil Bateman
Bruce Barber, Ponte Vedra Chairman
Brookes Burkhardt
Jeff Kamm
Tom Myrick
Beverly Slough, NW Conty Chairman
David Toner
Ann Breidenstein, Secretary, Ex-Officio

DIRECTORS —

David Alban
Dan Alexander
Bruce Barber

Cecil Bateman
Art Beck
Don Blackburn
Cathy Brown, Ex-Officio
Robin Burchfield
Brookes Burkhardt
Cathleen A. Burns, MBA, CFP
Patrick Canan
Dan Chitwood
Dr. Edward Dieguez
Ken Forrester
Randy Gorick
Donna McQuaig Haynes
Ronnie Hughes
Dr. Joseph Joyner
Jeff Kamm
Terri Kamm
Lynda Kirker
Nancy McAlum
Derek May
Diane Motes
Tom Myrick

Brian Nicholson
Jan Pearce
Mary Ramsey
John Regan
Dr. Sherry Risch
Michael Rotelle
Jack Schmidt
Dave Scott
Beverly Slough
Ruthie Sullivan
Hayden Taylor
Chris Thompson
David Toner

HONORARY DIRECTORS —

Marianne Brinkoff
Chris Conzemius
Doug Shull
State Rep. Doug Wiles



OFFICE LOCATIONS:

117 Bridge Street • St. Augustine, FL 32084

151 Sawgrass Corners Drive • Ponte Vedra Beach, FL

309 Kingsley Lake Drive, Suite 903 • St. Augustine, FL

Phone: 904-829-9721 • Fax 904-829-9284 • Email: uwosjc@aug.com

www.firstcoastunitedway.org

United Way Staff...

Ann H. Breidenstein, Executive Director

R. Mark Wells, Finance Director

Nancy Burns, Program Director

Jim Burns, Program Assistant

Robin Reems, Accounting Assistant

President's Message...

On March 14, 2007, our United Way celebrated its 50th Anniversary! A few days prior, we brought together 23 past United Way Board Presidents for a reunion on the very property where the organization's first annual meeting was held, March 14, 1957. 2007 was a year of celebration of the past and plans for the future including immediate past president Jim Spaulding forming United Way's Past Presidents' Council which will meet periodically to advise and council future board of directors.

In July, United Way's NW Advisory Board opened an office off of State Road 210 to enable member agencies and community groups space to meet with northwest residents in need of services and to hold meeting/support groups. Due to the efforts of our Ponte Vedra United Way Board, the Ponte Vedra United Way office continues to serve Ponte Vedra Beach residents with counseling services.

The campaign! Congratulations to Tim Eymer and his co-chair Melinda Bergbom for successfully reaching our goal of \$1.4 million! Jack and Lori Schmidt and Allen and Delores Lastinger did an outstanding job too (see Tim's campaign report) increasing members to our Alexis de Tocqueville Society!

The allocations process to distribute campaign funds to our member agencies and programs was a tremendous success due to the outstanding leadership of Conley Weiss and his vast committee of dedicated community volunteers.

A committee was recently formed to study birthing outcomes in our county, particularly ways to reduce premature birth which can lead to disability and long-term health implications. Many thanks to Tom Myrick, Chairman, for heading up this effort.

United Way will continue to monitor and strengthen performance outcomes on services provided by our funded partners in order to insure that donors' dollars are making a positive impact in St. Johns County. We are challenged by the growing number of families who are struggling under the weight of lost jobs, housing and childcare costs, and health issues. Food is badly needed — donations of nonperishable food items would be greatly appreciated now until the much-awaited Letter Carriers Food Drive the second Saturday in May. God Bless our Letter Carriers and the people who donate food to their food drive.

Our Agency Admissions Committee, chaired by Dr. Sherry Risch, recommended Emergency Services and Homeless Coalition and Good Samaritan Health Clinics to join our family this past year! We welcome them and look forward to being part of their important life-saving work in our community. We also added an option to 501©3 non-profit organizations who do not want United Way funding but who wish to be awarded United Way certification, thus broadening opportunities for United Way to "increase the organized capacity of people to care for one another."

We spruced up our website, www.firstcoastunitedway.org, making it easier for users to navigate. Many thanks to Paul Smith for his creative work!

We've had a great year thanks to the outstanding volunteers and contributors who so generously supported our efforts. In 2007, St. Johns County residents reduced and prevented suffering, trauma, hopelessness, and misery for people from all walks of life and income levels. One out of every three residents will or has benefited from the services provided by a United Way member agency. Contributing to United Way is an investment; an act of kindness and caring that we make for each other.

It has been my pleasure serving as president and I look forward to joining Jim Spaulding's Past President's Council to continue to make our community the best it can be through the United Way of St. Johns County.





**PAST PRESIDENTS' REUNION
MARCH 14, 2007**

*In Loving Memory of
Jimmy Brock, W.C. Edmiston & Hamilton D. Upchurch*



**HAMILTON
UPCHURCH**
Pres. 1959-60



W.C. EDMISTON
Pres. 1958-59



**JIMMY
BROCK**
Pres. 1957-58

Campaign Chairman's Message... Tim Eymer

I am very pleased to report that we met our goal to raise \$1,400,000.00. We got off to an early start with a great team of enthusiastic volunteers who worked hard for several months meeting with corporate and community leaders, presenting to countless employee groups and civic organizations, and participating in special events — all for the sake of their St. Johns County neighbors in need.

One of the areas that we are particularly pleased with is our effort to increase members to our highest leadership circle, The Alexis de Tocqueville Society. Led by de Tocqueville chairmen Jack and Lori Schmidt and Allen and Delores Lastinger, six more couples have contributed at least \$10,000 to our campaign. Their philanthropic spirit to improving the quality of life in our community is inspiring and will touch countless lives over the upcoming year.

Publix, Ring Power, the School District, JC Penney, numerous financial institutions, commercial businesses and our residential mailing campaign have continued to be very strong supporters. The County Employee campaign was outstanding — many thanks to County Administrator Michael Wanchick and his department heads. Kudos to St. Johns County Council on Aging for setting the standard in non-profit employee participation and results!

Our Day of Caring in support of Habitat brought 30 volunteers out for the day painting and putting up soffits at two Habitat homes. We all learned a lot that day, the weather cooperated and a great time was had by all!

We were pleased with our first time 5K Walk for United Way last March — many thanks to all of our major sponsors, Good Day Apparel (Mark Roresek) and co-sponsors: Bob Sweeney, Dunkin' Donuts, Winn-Dixie, Florida Power & Light, for their generous support. Also, many thanks to Flagler College's Dow Advantage students, Marcella Flynn, Jennifer Gager and Bailey Toombs for organizing this event which we hope to hold every year.

We were honored to have been chosen for a second year to be recipients of the proceeds from the World Golf Hall of Fame's Festival of Trees along with the St. Augustine Record's Empty Stocking Fund! Many thanks to Peyton Taylor of World Golf Hall of Fame and Mark Schwantner of Renaissance Resort at World Golf Village. We are particularly humbled by the generosity of James Carter, Josh Rowe and Lauren Pazder (all college students) who work at The Reef at North Beach for donating their tips earned on the 2nd Friday of each month.

Publix came through again with another outstanding Loaned Executive, Jeff Wiseman, who spent three months in our United Way working on the campaign. Jeff did a terrific job!

We continue to urge our commuting residents who work outside of St. Johns County to designate their United Way gifts to United Way of St. Johns County so that our residents can determine where their money goes — not another county on our behalf. No one knows our community better than those who live here, so please help us get the word out to give where you live!

It has been a pleasure working with so many caring individuals on this important effort. Deep appreciation is also due to Melinda Bergbom, my co-chair and campaign chair-elect. I look forward to working with her on the upcoming campaign.



DAY OF CARING
September 28, 2007



THE REEF AT NORTH BEACH
Josh Rowe, James Carter & Lauren Pazder

2007 Campaign Cabinet...

ST. JOHNS COUNTY CO-CHAIRMAN —
Melinda Bergbom, Wachovia Bank

NORTHWEST CAMPAIGN —
Beverly Slough, Chairman,
St. Johns County School Board

NORTHEAST CAMPAIGN —
Jack Schmidt and Bruce Barber, Chairmen

ALEXIS DE TOCQUEVILLE SOCIETY —
Jack Schmidt and Bruce Barber

SPECIAL EVENTS —
Nancy McAlum, Upchurch, Bailey & Upchurch

LOANED EXECUTIVE PROGRAM —
Jeff and Terri Kamm

CAMPAIGN PROMOTION —
Derek May, St. Augustine Record

MAJOR CORPORATE COMMITMENT (UNIT A) —
Melinda Bergbom

BUSINESS (B) —
Ruthie Sullivan, JC Penney

COMMERCIAL (C) —
David Scott, Publix

FINANCIAL (D) —
Diane Motes, VyStar Credit Union

GOVERNMENT & EDUCATION (E) —
Dr. Joe Joyner, Superintendent
St. Johns County School District,
Dan Chitwood, for the Sheriff's Office
and John Regan for the City of St. Augustine

PROFESSIONAL (F) —
Dr. Ed Dieguez, MD,
Pat Canan

INDUSTRIAL (G) —
Hayden Taylor, Appraisal Associates

RESIDENTIAL (M) —
Tim Eymer, Ponte Vedra Recorder and Jack Schmidt

FLORIDA STATE EMPLOYEE
CHARITABLE CAMPAIGN —
Pat Lowe, Florida Department of Law Enforcement

PRESIDENT'S CLUB —
Past Board President,
Jim Spaulding, SunTrust Bank

United Way

2007-2008 Loaned Executive Roster...

Jeff & Terri Kamm (Chairs)
Lisa Franklin
Alpha Omega Miracle Home
Teresa Andrews
Epic Community Services
Patti Greenough
Epic Community Services
Jorge Campos
Aaron Jockers
JC Penney
Becky Stringer
Catholic Charities Bureau
Caroline & Al Wolff
St. Gerard Campus
Mary Ann Thomas
YMCA, Winston Family
Janet Hutson
Learn to Read
Ron Marhanka
The Hardy Group
Tony Coleman
Police Athletic League
Pam Brizendine
Police Athletic League
Dave Tarbert
Police Athletic League

Bill Lazar
St. Johns Housing Partnership
Vickie Hall
Diane O'Donohue
Winston YMCA
Rehee Morris
St. Francis House
Gary Bruce
Project Special Care
Denise Rosa
Project Special Care
Pat O'Connell
St. Johns Council on Aging
Linda Hood
St. Johns County School Board
Kay Green
Council on Aging
Diane Quick
Habitat for Humanity
Jeff Willoughby
St. Augustine Family YMCA
Dawn Bell
Early Learning Coalition
Paul Kirkley
St. Augustine Family YMCA

Katie Prevatt
American Red Cross
Captain Timothy Delaney
Salvation Army
Jennifer J. Sickler
Haven Trust Bank
Linda Baker
Haven Trust Bank
Cindy Stoddart
Cultural Center
Sue Hutchins
Kid's Bridge
Justin Forbes
Young Line of St. Johns County
Ann Guenther
Bayview
JL Duff
Target
Vicki Lowe
Girl Scouts
Theresa Giancola
Bayview
Pat Weddle



Fund Distribution Report...

Conley Weiss, Vice President

Over a two-week period, volunteers worked in teams to determine levels of funding to our member agencies. These dedicated individuals toured agency facilities, watched programs in action, and met with agency officials on budgetary matters prior to making a funding recommendation to United Way's Board of Directors.

As our community grows, so does become the challenge to direct donor's dollars where they are needed most. I am pleased with the dedication and thoroughness by which both our volunteers and agencies approached this year's process, and grateful for donating their time and expertise.

Many thanks are due to the following community leaders who poured hours into this vitally important process.



2007 Allocation Volunteers...

BRIGHTER FUTURE FOR OUR CHILDREN & YOUTH PANEL I —

Gabe Hynes, Co-Chairman
Justin Breidenstein, Co-Chairman
Bill Abare III
Jennifer Sickler
Paula Delaney
Dr. John Van Olphen
Jan Felixson

BRIGHTER FUTURE FOR OUR CHILDREN & YOUTH PANEL II —

Melinda Bergbom, Co-Chairman
Linda Hood, Co-Chairman
Stephanie Johnson
Dep. Sheriff Joe Bowen
Chip Handley
Jack Rinehart
Frank Alligood

INDEPENDENCE FOR THE ELDERLY & DISABLED

Jeff Kamm, Co-Chairman
Terri Kamm, Co-Chairman
Steve Faustini
Dr. Marc Sokolay
Derek May
Cynthia McAuliffe
Nick McAuliffe

PERSONAL CRISIS & DISASTER PANEL I

Dan Alexander, Co-Chairman
Mary Alice Colson, Co-Chairman
Michael Siragusa
Ben Coney
Aaron Jockers
Cherie Dolgin

PERSONAL CRISIS & DISASTER PANEL II

Hayden Taylor, Co-Chairman
Ken Forrester, Co-Chairman
Wendy Tyson
Dave Scott
Bill Cooke
Pat Lowe
Catherine DeHate

STRONGER FAMILIES & NEIGHBORS PANEL I

Art Moore, Co-Chairman
Linda Baker, Co-Chairman
Tammy Marshall
Neal Smith
Jim Stinson
Chuck Hooper

STRONGER FAMILIES & NEIGHBORS PANEL II

James Tucker, Co-Chairman
Art Beck, Co-Chairman
Mark Oakley
Karen Brannon

WELLNESS & PROTECTING OUR HEALTH

David Toner, Co-Chairman
Dennis Craft, Co-Chairman
Diane Motes
Bruce Barber
Don Blackburn
Nancy McAlum
Robert Carmines

Northwest Advisory Board...

Beverly Slough, NW Advisory Board Chairman

Tracy Ambuehl
Kathy Bravo
Mike Brown
Suzanne Brown
Angie Christ
Tim Eymer
Mary Fagan
AnneMarie Gennusa
Debbie More
Jack Rinehart
Rebecca Taus
Chris Thompson



GRAND OPENING - CHAMBER RIBBON CUTTING UW NORTHWEST OFFICE

July 24, 2007



**DON BLACKBURN,
TIM EYMER, BRUCE BARBER**

Ponte Vedra Beach Advisory Board...

Bruce Barber, Advisory Board Chairman
Don Blackburn
Dennis and Kay Craft
Tim Eymer
Josue Jenkin
Chuck & Eileen Johnson
Chuck Powell
Mary Ramsey
Jack Schmidt

Admissions Process 2007 Committee Members...

United Way welcomes Emergency Services and Housing Coalition and Good Samaritan Health Clinics to our family of partner agencies.

Many thanks to the following volunteers for serving on the 2007 Admissions Process.

Dr. Sherry Risch, Chairman • Bill Abare, III, CPA • Jim Spaulding • David Toner

2007 Treasurer's Report...

BALANCE SHEET - DECEMBER 2007

Assets:

| | <u>December 31, 2007</u> | <u>December 31, 2006</u> |
|---------------------------|--------------------------|--------------------------|
| Cash | \$503,241 | \$443,721 |
| Other Investments | \$230,117 | \$220,876 |
| Pledges Receivables (net) | \$1,024,162 | \$1,004,003 |
| Other Receivables | \$386 | 0 |
| Misc. Assets | \$26,101 | \$31,487 |
| Building & Land | <u>\$118,411</u> | <u>\$111,128</u> |
| | \$1,902,418 | \$1,811,215 |

LIABILITIES & FUND BALANCE

| | | |
|--------------------------------------|--------------------|--------------------|
| Liabilities | <u>2007</u> | <u>2006</u> |
| Accounts Payable | \$2,313 | \$8,455 |
| *Unearned Revenues (gross) | <u>\$1,449,059</u> | <u>\$1,345,796</u> |
| Total Liabilities & Deferred Revenue | \$1,451,372 | \$1,354,251 |

FUND BALANCE

| | | |
|----------------------------------|-----------------|-----------------|
| Unrestricted | \$56,593 | \$23,508 |
| Restricted | \$368,757 | \$376,026 |
| Excess Revenue Over Expenditures | <u>\$25,696</u> | <u>\$57,430</u> |
| TOTAL LIABILITIES & FUND BALANCE | \$1,902,418 | \$1,811,215 |

STATEMENT OF REVENUES & EXPENDITURES

| | | |
|-------------------------------|-----------------|-----------------|
| Revenue | <u>2007</u> | <u>2006</u> |
| Public Support | \$1,315,918 | \$1,083,374 |
| Government Fees | \$399 | \$474 |
| Sales & Sponsorship | \$26,015 | \$25,053 |
| Misc. Revenue | <u>\$43,643</u> | <u>\$27,973</u> |
| TOTAL PUBIC SUPPORT & REVENUE | \$1,385,975 | \$1,136,874 |

EXPENDITURES

| | | |
|----------------------------------|--------------------|------------------|
| Admin./Fundraising/Program | \$354,049 | \$306,017 |
| **Allocations | <u>\$1,006,230</u> | <u>\$773,427</u> |
| TOTAL EXPENDITURES | \$1,360,279 | \$1,079,444 |
| EXCESS REVENUE OVER EXPENDITURES | \$25,696 | \$57,430 |

*Includes adjustments and pledges received after 12/31/07

**Includes designations and grants to non-member agencies as well as disaster relief.



**BILL ABARE III, CPA
BOARD MEMBER**



ST. JOHNS COUNTY INC.

P.O. Box 625

St. Augustine, Florida 32085-0625