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United  
Way



Kaua'i United Way

# 2022 *Annual Report*



# Mahalo



nui loa Kawai



# VISION STATEMENT

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► Kauaʻi United Way is the premier organization for charitable giving on Kauaʻi. We have successfully established a unified effort to mobilize resources – dollars, volunteers, in-kind support, and public concern – and apply them in ways that best serve the needs of our community. As a result of our diverse marketing and innovative fundraising strategies, when people consider making a gift to Kauaʻi’s charitable causes, they think first of Kauaʻi United Way. As the generosity of our residents and visitors increases, KUW maximizes its support to a growing number of non profit agencies, strengthening them so they can focus more on services and less on fundraising.

# STATEMENT OF PURPOSE

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► In 1943, a small group of passionate, visionary community leaders – Elsie and Mabel Wilcox, A. Hebard Case, Lindsay Faye, Andrew Gross and Bernard D. Pratt – determined to “transmit the community not less but greater, better and more beautiful than it was transmitted to us” established the precursor organization which became known as Kauaʻi United Way. They believed that “this organization could unite community non-profits in an annual funding appeal and then distribute these funds appropriately.” It was also their intent to “develop, strengthen and make socially more effective the operation of such services and to promote cooperation, efficiency and economy in the operation of organizations so that the general welfare of the people of Kauaʻi would be advanced and that dependency, delinquency and defectiveness and such social conditions as tend to create them may be reduced and ultimately eliminated.” Today, we continue to honor these noble sentiments by providing a vital framework for our community to care for itself.



# *a message from the* **PRESIDENT**



On behalf of Kaua'i United Way I am honored to express our deepest gratitude to everyone who has partnered with us to continue our critical work throughout another challenging year impacted by COVID-19. Your unwavering support has allowed us to exceed our fundraising goals and to continue to make a difference in the lives of the people we serve on Kaua'i.

We are proud to work with a network of nonprofit partners who are dedicated to improving the lives of those most in need, and we remain committed to supporting them in any way we can. This year our golf tournament made a triumphant return, rejoining the golf ball drop, Rum Fire's Table 53 promotion, the Wave of Compassion, payroll deductions, and corporate donations as the many ways that the Kaua'i United Way 'Ohana comes together for the benefit of our community.

We were thrilled too to add an event: the first annual Moonlight Express! It was an unqualified success, and we promise an even bigger event this year.

We are excited for new members to join our Board of Directors, and we look forward to the energy and ideas they will bring. At the same time, we are deeply grateful for the commitment, wisdom, and continuity of our long-time directors. Carol, Ron, Maureen, Beth, Lani, and Clift: thank you! You are our guiding lights, and we don't know what we would do without you.

It is noteworthy that this is Kaua'i United Way's 80th year serving our community. That is a milestone worth celebrating. Another milestone worthy of celebration is our Acting Director, Lori, beginning her 30th year with Kaua'i United Way. Her dedication and leadership have been instrumental in shaping our organization into what it is today. We are grateful for her service and look forward to continuing to work with her in the years to come.

Thank you to Tim, Lynette, our Campaign Committee, and everyone who donated to a blockbuster campaign. Thank you to our volunteers. Thank you to our Board of Directors. Thank you to everyone who gives, however you choose to give. We literally could not do it without you. As we continue with our 80th year of serving the people of Kaua'i, Kaua'i United Way stands ready to carry on our mission with gratitude, hope, and enthusiasm.

Mahalo nui loa,

*Nicholas Courson* | BOARD PRESIDENT



# *a message from the acting* **EXECUTIVE DIRECTOR**



Aloha, I would like to start off by saying how incredibly grateful I am for the work that we do and the community that we are a part of. This past year was such a proud year for me as it should be for all of you! Over the last couple of years, dealing with a global pandemic and feeling the significant impacts throughout our island home, I can say; wholeheartedly, that we overcame tremendous obstacles and have since then flourished in an effort to help those less fortunate.

First off, I would like to acknowledge how well, as a collective, we have navigated through the Covid-19 Global Pandemic. Throughout 2022, with all of its “ups and downs”, we persevered and accomplished great things! Thank you to all who were an integral part of it over the last year. Second, within 2022, we were allowed to have gatherings of a larger number of people thus bringing back our golf tournament and adding it to our Golf Ball Drop! I’m pleased to announce that we achieved almost \$53,000, which is more than we have ever netted since its inception in 2001! Lastly, agency allocations were up \$77,000 from the previous year! This is outstanding!!!

I would like to extend a heartfelt thank you to the United Way! This organization is paramount for the needs of our community and we set the standard for how we rally, come together and help those in need. Especially here on Kaua’i, with a staff of two, we are able to maximize and set every process in place to efficiently and effectively be a support for our community!

I would also like to recognize and thank our current board members for their knowledge, leadership and compassion. Having trusted and valued individuals at the helm help to steer this massive organization in the right direction to best support our community is not easy at all. Know that we acknowledge and thank you for all your help.

To our Employee Group partners, we humbly thank each and everyone of you! Without you, our efforts would be minimal and our community would definitely feel that negative impact. Allowing us the opportunity to integrate into your places of business to connect on a personal level with your employees is amazing. Trusting the United Way on that level is incredible and we are truly thankful for that.

Serving the people of Kaua’i is, and will continue to be, at the heart of our Kaua’i United Way mission. We stand together in fulfilling this mission and I am excited for what 2023 has in store for us. Again, many thanks for everyone’s dedication and love!

Mahalo Nui Loa,

# statement of FINANCIAL INFORMATION

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**JUNE 30  
2021**

**2022**

## **ASSETS**

### **CURRENT ASSETS**

- Cash and cash equivalents
- Certificates of deposit

#### ***Pledges receivable:***

- Campaign
- Less allowance for doubtful accounts

- Investments
- Prepaid expenses

### **TOTAL CURRENT ASSETS**

### **PROPERTY AND EQUIPMENT**

- Office space
- Fee interest
- Furniture and equipment
- Less accumulated depreciation

### **TOTAL PROPERTY AND EQUIPMENT**

### **TOTAL ASSETS**

### **LIABILITIES & NET ASSETS**

#### **CURRENT LIABILITIES**

- Deferred income
- Current maturity long-term debt

### **TOTAL CURRENT LIABILITIES**

- LONG-TERM DEBT
- NET ASSETS

- Without donor restrictions
- With donor restrictions

### **TOTAL NET ASSETS**

### **TOTAL LIABILITIES AND NET ASSETS**

\$ 329,789	\$ 330,578
176,929	177,100
105,541	114,891
(50,000)	(35,000)
55,541	79,891
684,254	611,037
3,518	2,723
<b>1,250,031</b>	<b>1,201,329</b>
143,615	143,615
173,965	173,965
10,331	10,331
(72,601)	(77,391)
<b>255,310</b>	<b>250,520</b>
<b>\$1,505,341</b>	<b>\$1,451,849</b>
\$ --	\$ 34,520
5,100	--
<b>5,100</b>	<b>34,520</b>
142,734	--
1,022,112	1,003,171
335,395	414,158
<b>1,357,507</b>	<b>1,417,329</b>
<b>\$ 1,505,341</b>	<b>\$ 1,451,849</b>





# statement of ACTIVITIES

FISCAL YEARS ENDED \_\_\_\_\_ **JUNE 30**  
**2021 2022**

## CHANGES IN NET ASSETS

*without donor restrictions*

### Revenues and gains:

• Events	\$ 43,449	\$ 45,050
• Interest and dividends	13,352	18,254
• Realized and unrealized investment gains		
• Net of losses	89,742	(91,237)

### TOTAL REVENUES, GAINS AND LOSSES

**146,543 (27,933)**

Net assets released from restrictions-

Satisfaction of program restrictions

304,285 197,817

### TOTAL REVENUES AND GAINS

### WITHOUT DONOR RESTRICTIONS

**450,828 169,884**

### Expenses:

• Program services-Campaign and program	489,544	368,434
• Events	5,179	7,979
• Management and general	72,988	73,498

### TOTAL EXPENSES

567,711 449,911

### DECREASE IN NET ASSETS

**(116,883) (280,027)**

*without donor restrictions*

### CHANGES IN NET ASSETS

**(116,883) (280,027)**

*without donor restrictions*

Campaign contributions

500,201 537,666

PPP loan forgiveness

29,046 --

Covid-19 emergency fund contributions

36,000 --

Net assets released from restrictions-

Satisfaction of program restrictions

(304,285) (197,817)

### INCREASE IN NET ASSETS

**260,962 339,849**

*with donor restrictions*

### INCREASE IN NET ASSETS

**144,079 59,822**

### NET ASSETS AT BEGINNING OF YEAR

**1,213,428 1,357,507**

### NET ASSETS AT END OF YEAR

**\$ 1,357,507 \$ 1,417,329**



# 2022 PARTNER AGENCIES

- Big Brothers, Big Sisters of Kauaʻi
- Boy Scouts of America,  
*Aloha Council, Kauaʻi District*
- Catholic Charities Hawaiʻi  
*- Kauaʻi*
- Child & Family Service
- Crime Stoppers Kauaʻi, Inc.
- Friendship Club
- Friends of the Kauaʻi Drug Court
- Girl Scouts of Hawaiʻi
- Hale Kipa
- Hawaiʻi Children's Theatre
- Hawaiʻi Foodbank  
*- Kauaʻi Branch*
- Healing Horses Kauaʻi
- Kauaʻi Economic Opportunity, Inc.  
*- Homeless Program*
- Kauaʻi Economic Opportunity, Inc.  
*- Mediation Program*
- Kumu's Cupboard
- Legal Aid Society of Hawaiʻi  
*- Kauaʻi*
- Life's Bridges
- Malama Pono Health Services
- Mental Health Kokua
- Parents & Children Together  
*- PACT Kauaʻi*
- PATCH  
*- People Attentive to Children*
- The Salvation Army
- YMCA of Kauaʻi



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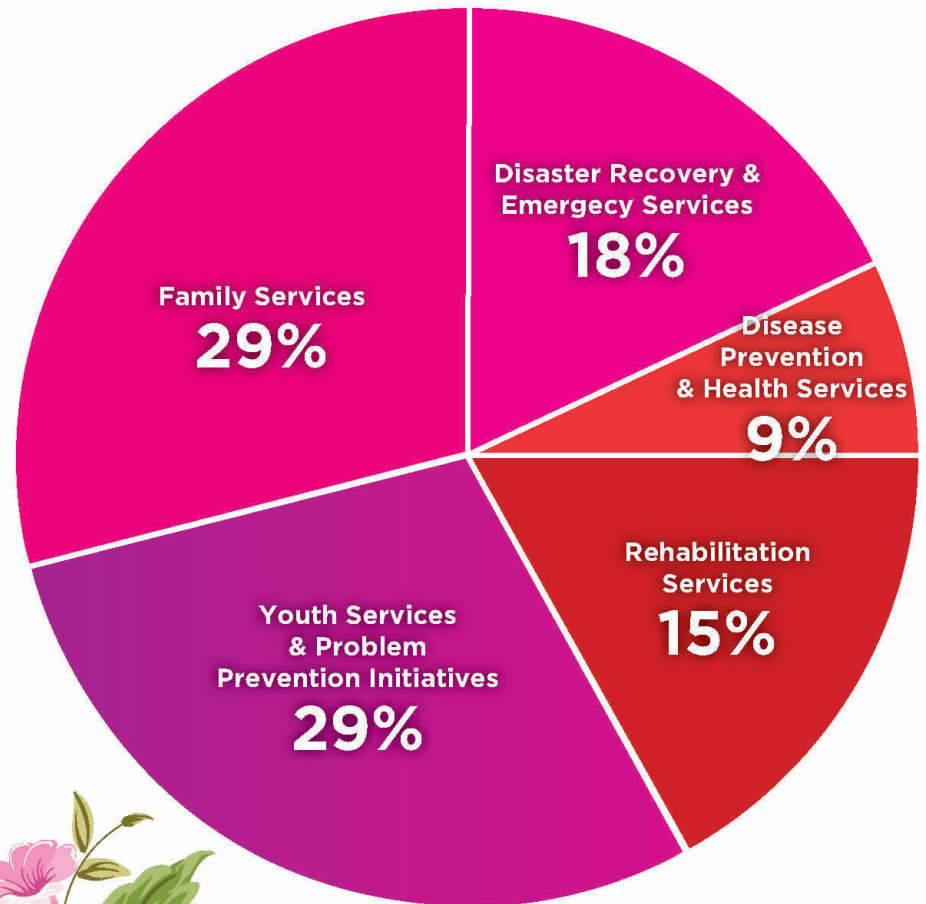
*Providing leadership to unite the people of Kauaʻi by sharing resources to better care for one another.*

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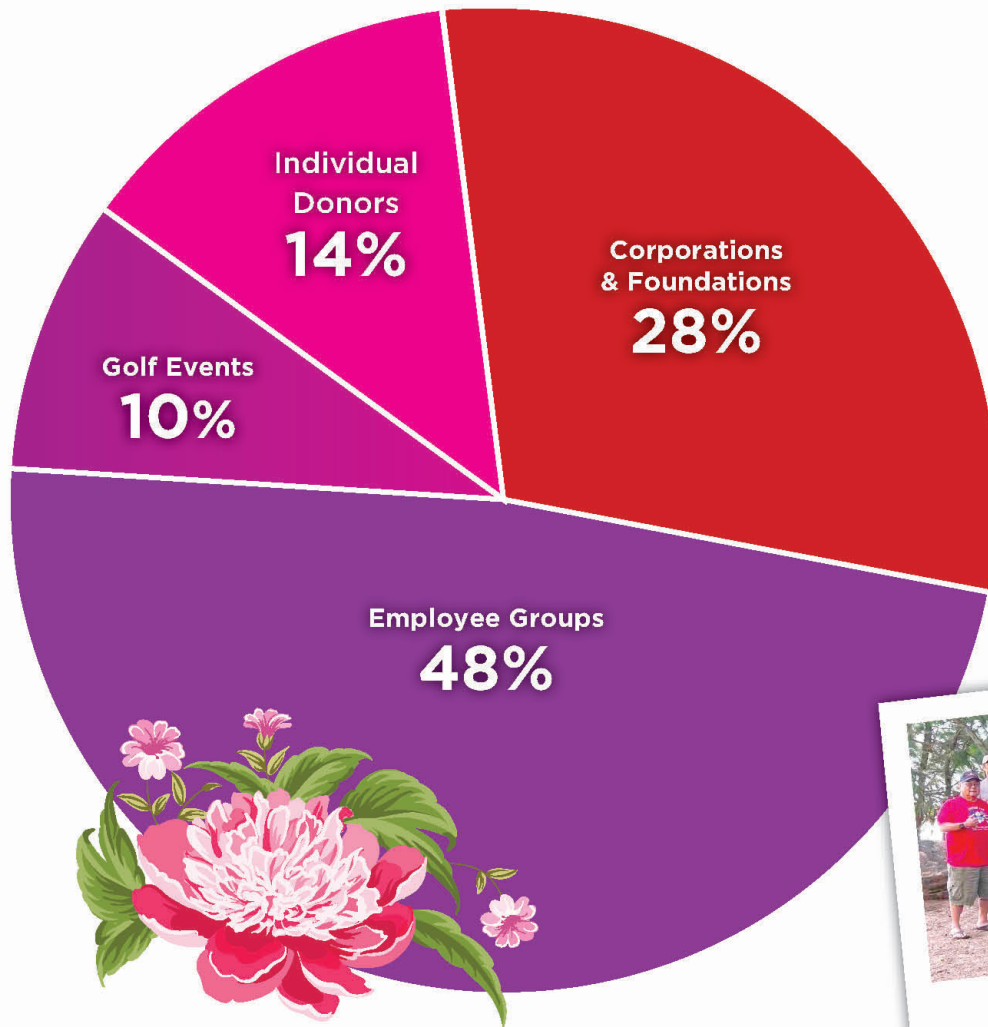


# AGENCY ALLOCATIONS



# CAMPAIGN *Income Sources*

## \$600,000 GOAL





# BOARD OF DIRECTORS

## Term Ending 2025

S. Lani Aranio  
*Marriott Vacations Worldwide*

Clifton Arruda  
*Central Pacific Bank*

Sarah Blane  
*County of Kaua'i*

Michael Contrades  
*County of Kaua'i*

Nicholas Courson  
*County of Kaua'i*

Jamie Kimura  
*Koga Engineering & Construction, Inc.*

Shelly Gerardo  
*Kukui'ula Development*

Christopher Nii  
*HGEA, AFSCME, Local 152*

Taylor Shigemoto  
*HawaiiUSA Federal Credit Union*

## Term Ending 2024

Lili Bryan-Conant  
*Retired*

Stacie Chiba-Miguel  
*The Shops at Kukui'ula*

Carol Furtado  
*King Auto Center*

Kai-Yun Kao  
*Audacious Inquiry, LLC*

Dan King  
*Grand Hyatt Kaua'i Resort & Spa*



## Term Ending 2023

Beth Amaro  
*Kaua'i Island Utility Cooperative*

JoRae Baptiste  
*Kaua'i Community College*

James Sone  
*Hawaiian Telcom*

Maureen Tabura  
*Kaua'i Community College*

Tim Takeshita  
*Enterprise Holdings, LLC*

Coty "Buffy" Trugillo  
*Kamehameha Schools*

Ron Wiley  
*KONG Radio Group*

## Honorary Board Members

Mayor Derek Kawakami  
Tony Faye  
Mike Kano  
Yoshiko "Dimples" Kano  
Maryanne Kusaka  
Barbara Nagamine  
David Pratt  
Peter Yukimura

## Officers

*President* | Nicholas Courson  
*Vice-President* | Michael Contrades  
*Treasurer* | Clifton Arruda  
*Secretary* | Carol Furtado





**Kaua'i United Way**



# 2022 *Annual Report*

Presented at the Kaua'i United Way  
Annual Meeting & Mahalo Celebration

**April 6, 2023**