



ANNUAL REPORT

2014-2015 CAMPAIGN



ASPIRE TO HELP PEOPLE LIVE THE BEST LIVES POSSIBLE.

Every day, people in our community are struggling to put food on the table, cope with mental and physical health challenges or to be independent. One person can't tackle every issue. It takes all of us working together. We all win when children succeed in school, people are healthy and productive, and families are financially stable.

Aspire to change tomorrow starting today. At United Way, we celebrate being part of a team and culture that continues to help change lives and shape communities. United Way is continuing work on our transformation plan so we can better address the ever-changing needs of our region. We held 63 Community Conversations across seven parishes to listen and learn.

GIVE

However you choose to give—through your time, your muscle or your voice—and however much you give, your donation makes life better for people right here.

ADVOCATE

Lend your voice to champion a cause. We have successfully advocated for many issues including improving the quality of child care centers and creating laws to help victims of domestic abuse.

VOLUNTEER

United Way works with volunteers and local nonprofits in our seven parish region. We develop meaningful opportunities for students, adults and seniors.

OUR MISSION To increase the organized capacity of people to be independent and self-sufficient.

OUR GOALS To address critical issues and make the most impact on our community by focusing on Education, Income and Health.

EDUCATION

Aspire to have children achieve their potential. You can help improve access to affordable high quality early child care so kids are ready to learn when they enter school. You can help provide after-school and mentoring programs for at-risk youth and improve graduation rates.

INCOME

Aspire to have families become stable and financially independent. By supporting basic needs, like food or shelter, and increasing financial literacy, you're helping hardworking people receive job training and increase affordable housing opportunities for seniors and families.

HEALTH

Aspire to improve the health of people in our community. You can help increase health education and preventive care, improve access to critical health care services, and reduce substance abuse and domestic violence. Because of you, people across our region have saved more than \$1.2 million through discount prescription drug cards!



EDUCATION

United Way and NOLA Youth Works/Job 1 are collaborating to create a local career development model that incorporates the best practices of youth development while simultaneously being informed by the needs of local business. This multifaceted approach will improve youth employment skills, increase the competency of adults who work with adolescents, and engage businesses both as informants and beneficiaries of this career readiness work.

United Way's Success By 6 Collaborative has laid the groundwork to create a license class for Family Child Care providers. Louisiana is one of only three states that do not require licensure of paid child care arrangements that are provided in private homes. The goal of this legislative reform is to ensure the state provides needed oversight in health and safety to these child care settings and simultaneously pave the road to improved kindergarten readiness. Licensure will also benefit FCC parents and providers as it will allow them to participate in available state financial incentives such as the school readiness tax credits under the state's Quality Rating and Improvement System.

United Way also continues creating Born Learning Trails for our community. The Born Learning Trail is an interactive, playful and visible community engagement tool designed to help parents, caregivers and communities support early learning. It is a community change strategy, helping boost children's language and literacy skills – and encouraging families to get active. It's a great way to elevate awareness of early childhood education, connect volunteers to early learning and support year-round campaign strategies.



INCOME

United Way is at the lead of the Asset Building Coalition, a group vitally interested in helping working families. The partners operate Volunteer Income Tax Assistance or VITA sites across the region. Since 2009, more than 52,000 tax returns have been completed, resulting in \$77,069,768 returned to local families and reinvested in our region. \$31,483,143 is from the Earned Income Tax Credit or EITC. These refunds can make a vital difference to struggling families while bringing millions of federal dollars to our communities.

United Way has been the proud home of the Individual Development Account or IDA project since 2007. The IDA is a matched savings program that provides an income-eligible, working individual with financial management and asset purchase education leading to the purchase of a home, vehicle, or business. To date, 180 homes have been purchased, 56 vehicles, and 6 child care businesses have been started. The economic impact in the community is valued at \$21,214,976. In these economically uncertain times, there have been no foreclosures. This truly is one of the few proven ways to bring families out of intergenerational poverty.



HEALTH

Whether it is a neighbor without health insurance, a victim of abuse or someone struggling with mental illness or an addiction, United Way is working to ensure everyone has access to affordable and quality care. When adults have health insurance coverage, racial and ethnic disparities in access and quality are reduced or even eliminated.

We continued to partner with FamilyWise to distribute free prescription discount cards to everyone in Jefferson, Orleans, Plaquemines, St. Bernard, St. Tammany, Tangipahoa and Washington Parishes. FamilyWise cards immediately lower the cost of medicine by an average of 42% or more for people without insurance or for those who take medications not covered by their plan. Just by presenting the FamilyWise card at their local participating pharmacy, customers save on the cost of their prescription medicine 80% of the time. We helped our community save over \$1.2 million dollars in prescription costs with over 44,000 claims.

FINANCIAL HIGHLIGHTS

UNITED WAY OF SOUTHEAST LOUISIANA

Statement of Financial Position

June 30, 2015

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
ASSETS				
Cash and cash equivalents	\$ 936,684	\$ 1,630,254	\$ -	\$ 2,566,938
Investments, at fair value:				
Certificates of deposit	3,044,379	993,494	-	4,037,873
U.S. government securities	10,012	-	-	10,012
Mutual funds	-	253,609	1,646,335	1,899,944
Beneficial interest in assets held by others	967,773	-	2,218,076	3,185,849
Investment in common endowment fund of Greater New Orleans Foundation	306,293	-	14,724	321,017
Total investments	4,328,457	1,247,103	3,879,135	9,454,695
Pledge receivables, net	5,144,412	36,379	-	5,180,791
Other assets and prepaid expenses	112,323	51,442	-	163,765
Property, plant and equipment				
Land	302,893	-	-	302,893
Automobile	34,539	-	-	34,539
Building	1,193,245	-	-	1,193,245
Furniture and equipment	482,539	-	-	482,539
Less: accumulated depreciation	(1,341,826)	-	-	(1,341,826)
Total property, plant and equipment	671,390	-	-	671,390
Total assets	\$ 11,193,266	\$ 2,965,178	\$ 3,879,135	\$ 18,037,579
LIABILITIES AND NET ASSETS				
Allocations payable	\$ 3,799,217	\$ -	\$ -	\$ 3,799,217
Designations payable	1,838,884	22,749	-	1,861,633
Accounts payable and accrued expenses	471,317	46,752	-	518,069
Program payable	-	278,000	-	278,000
Total liabilities	6,109,418	347,501	-	6,456,919
Net assets:				
Unrestricted	5,083,848	-	-	5,083,848
Temporarily restricted	-	2,617,677	-	2,617,677
Permanently restricted	-	-	3,879,135	3,879,135
Total net assets	5,083,848	2,617,677	3,879,135	11,580,660
Total liabilities and net assets	\$ 11,193,266	\$ 2,965,178	\$ 3,879,135	\$ 18,037,579

The accompanying notes are an integral part of this financial statement.

UNITED WAY OF SOUTHEAST LOUISIANA

Statement of Activities

For the Year Ended June 30, 2015

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
SUPPORT AND REVENUE				
Public Support:				
Contributions	\$ 13,333,111	\$ 365,306	\$ -	\$ 13,698,417
Less:				
Provision for uncollectible accounts	(737,096)	(38)	-	(737,134)
Donor designations	(4,185,755)	(32,720)	-	(4,218,475)
Total public support	8,410,260	332,548	-	8,742,808
Revenue:				
Investment income, net	164,185	25,965	26,253	216,403
In-kind contributions	478,704	-	-	478,704
Grants, program and consulting fees	10,000	1,123,135	-	1,133,135
Special events, fundraisers and other income, net of expense	181,275	11,576	-	192,851
Service fee income	303,000	-	-	303,000
Rental income (loss), net of expense	(197,090)	-	-	(197,090)
Other income	11,518	18,057	-	29,575
Net assets released from restrictions	2,442,261	(2,442,261)	-	-
Total public support and revenue	11,804,113	(930,980)	26,253	10,899,386
FUNCTIONAL EXPENSES				
Allocations to agencies and other assistance provided	10,223,412	-	-	10,223,412
Less: designations to agencies	(4,218,475)	-	-	(4,218,475)
Net allocations	6,004,937	-	-	6,004,937
United Way Worldwide dues	113,426	-	-	113,426
Depreciation expense	92,587	-	-	92,587
Other functional expenses	5,361,443	-	-	5,361,443
Total functional expenses	11,572,393	-	-	11,572,393
Change in net assets	231,720	(930,980)	26,253	(673,007)
Net assets at beginning of year	4,852,128	3,548,657	3,852,882	12,253,667
Net assets at end of year	\$ 5,083,848	\$ 2,617,677	\$ 3,879,135	\$ 11,580,660

The accompanying notes are an integral part of this financial statement.

The firm of Duplantier, Hrapmann, Hogan, and Maher, LLP, audits the financial records of United Way of Southeast Louisiana [formerly United Way for the Greater New Orleans Area] annually. A copy of any complete audit is available upon request.

Combined Federal Campaign for Greater New Orleans

United Way for the of Southeast Louisiana (UWSELA) does not charge membership dues and/or service charges to charitable organizations that participate as members in the Combined Federal Campaign for Greater New Orleans (CFCGNO). UWSELA administrative costs are recovered from donations. There is a 10% administrative fee, with a cap of \$250.00 per donor. CFCGNO administrative costs are recovered from donations. The CFCGNO's Federal Executive Board approves the administrative costs and these costs are deducted from the charitable organizations designations due to them, based on their proportionate share of the overall campaign dollars raised.

BOARD OF TRUSTEES

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St. Bernard Port, Harbor, & Terminal District

John Hollowell
Shell Energy Resources Company

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Capgemini USA

Marian H. Pierre
Crescent Guardian Inc.

Tara Richard
U.S. Bankruptcy Court

Florence Schornstein
Community Volunteer

John Sillars
Community Volunteer

Tod Smith
WWL-TV/WUPL-TV/NW15

Kim Sport
Community Volunteer

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Wise Marketing Company

Danica Ansardi, CLU, ChFC, MBA
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Karin Bird
UPS

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Adams and Reese LLP

Karen Nabonne Coaxum
Director of Communications

Matt Faust
St. Tammy Parish Assessors Office

Mike Gill
Farm Bureau Insurance Company

Norma Grace
Community Volunteer

Al Hamaeui
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Coleman Ridley
Business Council of New Orleans

Tom Shaw
LOOP

Todd Slack
Huber, Slack, Houghtaling, Pandit & Thomas, LLP

Carol A. Solomon
Peoples Health

Robert "Bobby" Tanner
Rayburn Correctional Center

Yvonne VonderHaar
Community Volunteer

Barbara Turner Windhorst
Community Volunteer

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President and Chief Executive Officer

Charmaine Caccioppi
Chief Operating Officer

Debra Modlin
Chief Financial Officer

Beth Lee Terry
Executive Vice President Chief Transformation Officer

Terry Westerfield
Chief Communications Officer

Mary Ambrose
Senior Vice President, Community Impact

Jamene Dahmer Senior Vice President
Resource Development/Marketing

Carol Gstohl, PHR
Vice President of Human Resources and Administration



United Way Southeast Louisiana

*serving Jefferson, Orleans, Plaquemines, St. Bernard,
St. Tammany, Tangipahoa and Washington Parishes*

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