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!
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.
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.
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 FamilyWize to distribute free prescription discount cards to everyone in Jefferson, Orleans, Plaquemines, St. Bernard, St. Tammany, Tangipahoa and Washington Parishes. FamilyWize 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 FamilyWize 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.
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 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.

**UNIVERSAL WAY OF SOUTHEAST LOUISIANA**

**Statement of Financial Position**

**June 30, 2015**

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
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<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$936,684</td>
<td>$1,630,234</td>
<td>-</td>
<td>$2,566,918</td>
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<tr>
<td>Investments, at fair value:</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>3,044,379</td>
<td>993,494</td>
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<td>4,037,873</td>
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<td>U.S. government securities</td>
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<td></td>
<td></td>
<td>10,012</td>
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<tr>
<td>Mutual funds</td>
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<td>253,669</td>
<td>1,664,335</td>
<td>1,918,004</td>
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<tr>
<td>Investment in common endowment fund of Greater New Orleans Foundation</td>
<td>967,777</td>
<td>-</td>
<td>2,218,076</td>
<td>3,185,843</td>
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<tr>
<td>Total investments</td>
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<td>1,247,103</td>
<td>3,879,313</td>
<td>9,345,073</td>
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<tr>
<td>Pledge receivables, net</td>
<td>5,144,412</td>
<td>36,379</td>
<td>-</td>
<td>5,180,791</td>
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<td>Other assets and prepaid expenses</td>
<td>112,223</td>
<td>51,454</td>
<td>-</td>
<td>163,677</td>
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<tr>
<td>Property, plant and equipment</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land</td>
<td>302,893</td>
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</tr>
<tr>
<td>Automobile</td>
<td>34,539</td>
<td>-</td>
<td>-</td>
<td>34,539</td>
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<tr>
<td>Building</td>
<td>1,193,245</td>
<td>-</td>
<td>-</td>
<td>1,193,245</td>
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<tr>
<td>Furniture and equipment</td>
<td>482,539</td>
<td>-</td>
<td>-</td>
<td>482,539</td>
</tr>
<tr>
<td>Less: accumulated depreciation</td>
<td>(1,341,826)</td>
<td>-</td>
<td>-</td>
<td>(1,341,826)</td>
</tr>
<tr>
<td>Total property, plant and equipment</td>
<td>671,390</td>
<td>-</td>
<td>-</td>
<td>671,390</td>
</tr>
<tr>
<td>Total assets</td>
<td>$11,193,266</td>
<td>$2,965,178</td>
<td>$3,879,135</td>
<td>$17,037,579</td>
</tr>
</tbody>
</table>

**LIABILITIES AND NET ASSETS**

| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
| Allocations payable | $3,799,217 | - | - | $3,799,217 |
| Designations payable | 1,838,844 | 22,719 | - | 1,861,563 |
| Accounts payable and accrued expenses | 471,717 | 46,712 | - | 518,429 |
| 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 | - | 2,977,125 | - | 2,977,125 |
| 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 | $17,037,579 |

**SUPPORT AND REVENUE**

| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
| 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 | 381,275 | 11,576 | - | 392,851 |
| and other income, net of expense | 303,000 | - | - | 303,000 |
| Service fee income | (197,090) | - | - | (197,090) |
| Net assets released from restrictions | 2,442,261 | (2,442,261) | - | - |
| Total public support and revenue | 11,804,113 | (930,980) | 26,253 | 10,893,386 |

**FUNCTIONAL EXPENSES**

| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
| Allocations to agencies and other assistance provided | 10,223,412 | - | - | 10,223,412 |
| Less: designations to agencies | (4,218,473) | - | - | (4,218,473) |
| Net allocation | 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 | 11,572,939 | - | - | 11,572,939 |
| 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.
BOARD OF TRUSTEES

Chairman of the Board
Joseph Exnicios
Whitney Bank

Kevin Alker
Garrity Print Solutions

Lori Barthelemy
Whitney Bank

Anh Joseph Cao
Cao Law Firm

Christopher J. Claus
Entercom New Orleans

John Foley
Pan American Life

Capt. Scott Gootee
Naval Air Station Joint Reserve Base

Richard Haase
Latter & Blum, Inc.

Robert “Tiger” Hammond
AFL-CIO

Drew Heaphy
St. Bernard Port, Harbor, & Terminal District

John Hollowell
Shell Energy Resources Company

Edward J. Krause
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

Jessica Vermilyea
Lutheran Social Services Disaster Response

Carol B. Wise
Wise Marketing Company

Danica Ansardi, CLU, ChFC, MBA
Ansardi Financial Services

Karin Bird
UPS

Charles A. Cerise, Jr.
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
First Bank & Trust

Michael Hecht
GNO Inc.

Alexis D. Hocevar
Enterprise Holdings

Chris Kauffmann
St. Tammy Fire Dept.

Ricky R. Mathews
NOLA Media Group

Charles L. Rice, Jr.
Entergy New Orleans

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

 LEADERSHIP TEAM

Michael Williamson
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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