Hey You!

ANNUAL REPORT  2015-2016 CAMPAIGN
WHAT THIS PLACE NEEDS IS... YOU!

For more than 90 years, no other local organization has taken such a broad, objective view of the community as United Way. We spend a great deal of time identifying, assessing and monitoring the most pressing needs in our region.

We strategically fund programs, support collaborations, convene experts, advocate for change and foster new and needed community services to address the issues based on best practices. We work tirelessly to provide quality health and human services for our community and measure the results to ensure we are making a difference.

We’re committed to improving lives. But we can’t do it alone... what this place needs is YOU! Donors, advocates and volunteers like you are helping every day to advance the quality of life for thousands of individuals and the region as a whole.

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 care for one another in order to create a stronger community for all.
We’ve been around, done a lot, but there’s more to do. We can’t do it alone. We need YOU.

**Assess**
Alongside hundreds of local volunteers, we are able to identify our community’s problems.

- We listen to you at community conversations in our service area.
- Local experts research data and best practices from around the country.
- We merge and assess the data to find the issues.

**Create Solutions**
We are committed to solving social problems by taking a collective impact approach.

- We collaborate with agencies, businesses and government entities.
- We take a stand on social issues, such as domestic violence and education.
- People like you are joining our movement to unite our community.

**Invest**
We invest in the places where we live and work to make a stable community for families and businesses.

- We invest donor dollars wisely in quality programs and services.
- We monitor these investments so programs and services stay on track.
- Volunteers invest their time and muscle to give back to our community.

**Improve Our Community**
Our approach is making our community a better place. From raising families out of poverty through financial education, to uplifting the spirits of cancer patients through support systems, to giving children a brighter future by raising early learning standards, our work is making a difference. Won’t you help? Join us. LIVE UNITED.
EDUCATION

Five year old Bernard knows a lot of cool stuff. He can count to 100, say his ABC’s and write his name. He loves to learn and can’t wait to go to kindergarten! Henry is a United Way Loyal Contributor and has given to United Way for more than 50 years. Henry trusts United Way to help kids be ready to learn when they go to school. He knows that reaching kids early means they have a better chance at being successful later in life.

We need more donors like Henry.

What this place needs is more kids who know the cool stuff.

HEALTH

Elizabeth is a survivor. Her husband killed her daughter, then shot Elizabeth three times in the face. Last year, she joined hundreds of people at the State Capitol with United Way to rally for legislation to help victims of domestic violence. Margaret is part of the future generation of advocates who are inspired by the stories, experiences and incredible strength of these individuals.

We need more advocates like Elizabeth and Margaret.

What this place needs is less hurts, habits and hang-ups.

INCOME

Ricky is very busy January through April every year. He volunteers his time and expertise to help people do their taxes for free at local United Way tax preparation sites. Last year, he helped Joseph increase his refund. He even helped him find tax breaks he didn't know about. Now Joseph has more money to pay down his student debt and pursue a successful career that can support his family.

We need more volunteers like Ricky.

What this place needs is more money for every day.
Meet ALICE  
**ASSET LIMITED, INCOME CONSTRAINED, EMPLOYED**

ALICE is everywhere. From Amite to Arabi, Belle Chasse to Bogalusa, Mandeville to Marrero, the east bank to the west bank of New Orleans - ALICE lives in the wonderful mosaic of communities that make up Southeast Louisiana. ALICE represents community members working in jobs that are needed, but don’t always pay enough to afford the basics, such as our child care teachers, home health aides, mechanics, store clerks, office assistants and more. ALICE is men and women of all ages and races. ALICE is your customers, constituents, neighbors - even family members and friends. ALICE is the ‘working poor’.

United Way of Southeast Louisiana, in conjunction with the Louisiana Association of United Ways, has published the groundbreaking new study of financial hardship in our state. The United Way ALICE Report for Louisiana reveals 695,719 households - 40 percent of the state’s total - are ALICE. More than 208,000 of ALICE households live in southeast Louisiana.

The United Way ALICE Report employs a Household Survival Budget (HSB), incorporating household costs such as housing, food, child care, transportation, healthcare and taxes establishing a threshold for ALICE to survive. The average HSB for ALICE households in our seven-parish region estimates $19,248 is needed for individuals and $48,492 for a 2 parent/1 preschooler/1 infant family to afford the bare minimum. While this exceeds the Federal Poverty Level (FPL) of $11,490 for a single adult and $23,550 for a family of four, ALICE can barely live paycheck to paycheck.

Our goals are to give ALICE a voice, leverage the hard work of United Way and other nonprofits, and make it clear more needs to be done to help ALICE and those living in poverty so we can build a better, stronger Louisiana. We believe the United Way ALICE Report for Louisiana can equip communities with information to create innovative solutions.

United Way of Southeast Louisiana plans to use the ALICE study as a framework for improving lives and strengthening local communities. Many of the social problems in our region have the same root cause - poverty. Equipped with the knowledge gained from 63 listening sessions and held across our service area, United Way identified poverty as its “Big Issue” going forward. We’ve put our stake in the ground. We want business and individuals to join us in developing strategies and partnerships to educate and empower people to help lift them out of poverty.
## Financial Highlights

**United Way of Southeast Louisiana**

### Statement of Financial Position
June 30, 2016 with Summarized Comparative Totals for 2015

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2016</th>
<th>2015</th>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$221,846</td>
<td>$1,189,330</td>
<td>$1,411,176</td>
<td>$2,566,938</td>
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<tr>
<td>Investments, at fair value:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>4,410,854</td>
<td>975,027</td>
<td>5,385,881</td>
<td>5,677,873</td>
</tr>
<tr>
<td>U.S. government securities</td>
<td>10,013</td>
<td>-</td>
<td>10,013</td>
<td>10,012</td>
</tr>
<tr>
<td>Mutual funds</td>
<td>-</td>
<td>126,194</td>
<td>1,670,717</td>
<td>1,796,911</td>
</tr>
<tr>
<td>Beneficial interest in assets held by other</td>
<td>824,169</td>
<td>2,218,766</td>
<td>3,042,945</td>
<td>3,185,849</td>
</tr>
<tr>
<td>Investment in common endowment fund of Greater New Orleans Foundation</td>
<td>292,031</td>
<td>-</td>
<td>305,725</td>
<td>321,017</td>
</tr>
<tr>
<td>Total investments</td>
<td>5,537,067</td>
<td>1,101,221</td>
<td>3,903,571</td>
<td>10,541,850</td>
</tr>
<tr>
<td>Pledge receivables, net</td>
<td>5,248,962</td>
<td>22,819</td>
<td>5,571,721</td>
<td>5,668,791</td>
</tr>
<tr>
<td>Other assets and pre-paid expenses</td>
<td>105,556</td>
<td>38,791</td>
<td>-</td>
<td>144,347</td>
</tr>
<tr>
<td>Property, plant, and equipment:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land</td>
<td>302,893</td>
<td>-</td>
<td>302,893</td>
<td>302,893</td>
</tr>
<tr>
<td>Automobiles</td>
<td>34,539</td>
<td>-</td>
<td>34,539</td>
<td>34,539</td>
</tr>
<tr>
<td>Buildings</td>
<td>1,318,245</td>
<td>-</td>
<td>1,318,245</td>
<td>1,318,245</td>
</tr>
<tr>
<td>Equipment and furniture</td>
<td>407,859</td>
<td>-</td>
<td>407,859</td>
<td>407,859</td>
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<tr>
<td>Less: accumulated depreciation</td>
<td>(1,295,623)</td>
<td>-</td>
<td>(1,295,623)</td>
<td>(1,295,623)</td>
</tr>
<tr>
<td>Total property, plant, and equipment</td>
<td>607,913</td>
<td>-</td>
<td>607,913</td>
<td>607,913</td>
</tr>
<tr>
<td>Total assets</td>
<td>$11,781,264</td>
<td>$3,237,161</td>
<td>$3,403,571</td>
<td>$18,306,496</td>
</tr>
</tbody>
</table>

### Financial Highlights

**United Way of Southeast Louisiana**

### Statement of Activities
For the Year Ended June 30, 2016 with Summarized Comparative Totals for 2015

<table>
<thead>
<tr>
<th>SUPPORT AND REVENUE</th>
<th>2016</th>
<th>2015</th>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Support:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$14,570,513</td>
<td>$42,155</td>
<td>$14,612,668</td>
<td>$13,698,417</td>
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<tr>
<td>Less:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provision for uncollectible accounts</td>
<td>(769,486)</td>
<td>-</td>
<td>(769,486)</td>
<td>(737,134)</td>
</tr>
<tr>
<td>Donor designations</td>
<td>(3,967,164)</td>
<td>(6,935)</td>
<td>(3,974,099)</td>
<td>(4,218,475)</td>
</tr>
<tr>
<td>Total public support</td>
<td>9,833,663</td>
<td>35,220</td>
<td>9,869,083</td>
<td>8,742,808</td>
</tr>
<tr>
<td>Revenue:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment income, net</td>
<td>6,726</td>
<td>(43,236)</td>
<td>24,382</td>
<td>(12,128)</td>
</tr>
<tr>
<td>In-kind contributions</td>
<td>805,525</td>
<td>2,100</td>
<td>807,625</td>
<td>478,704</td>
</tr>
<tr>
<td>Grants, program, and consulting fees</td>
<td>35,352</td>
<td>1,746,362</td>
<td>1,781,714</td>
<td>1,133,135</td>
</tr>
<tr>
<td>Special events, fundraisers, and other income, net of expenses</td>
<td>178,427</td>
<td>-</td>
<td>178,427</td>
<td>192,851</td>
</tr>
<tr>
<td>Service fee income</td>
<td>337,729</td>
<td>36,230</td>
<td>373,979</td>
<td>303,000</td>
</tr>
<tr>
<td>Rental income (less), net of expenses</td>
<td>(173,938)</td>
<td>-</td>
<td>(173,938)</td>
<td>(197,099)</td>
</tr>
<tr>
<td>Other income</td>
<td>4,174</td>
<td>100</td>
<td>4,274</td>
<td>29,575</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>2,569,669</td>
<td>(2,609,669)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total public support and revenue</td>
<td>13,398,427</td>
<td>(592,873)</td>
<td>24,382</td>
<td>12,825,936</td>
</tr>
<tr>
<td>Total expenses:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FUNCTIONAL EXPENSES</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocations to agencies and other assistance provided</td>
<td>10,591,825</td>
<td>-</td>
<td>10,591,825</td>
<td>10,223,412</td>
</tr>
<tr>
<td>Less: designations to agencies</td>
<td>(2,974,699)</td>
<td>-</td>
<td>(2,974,699)</td>
<td>(2,974,699)</td>
</tr>
<tr>
<td>Net allocations</td>
<td>6,617,126</td>
<td>-</td>
<td>6,617,126</td>
<td>6,048,713</td>
</tr>
<tr>
<td>United Way Worldwide dues</td>
<td>132,053</td>
<td>-</td>
<td>132,053</td>
<td>113,426</td>
</tr>
<tr>
<td>Depreciation expense</td>
<td>77,413</td>
<td>-</td>
<td>77,413</td>
<td>92,587</td>
</tr>
<tr>
<td>Other functional expenses</td>
<td>5,679,698</td>
<td>-</td>
<td>5,679,698</td>
<td>5,361,442</td>
</tr>
<tr>
<td>Total functional expenses</td>
<td>12,506,890</td>
<td>-</td>
<td>12,506,890</td>
<td>11,372,393</td>
</tr>
<tr>
<td>Total liabilities and net assets</td>
<td>11,781,264</td>
<td>$2,357,161</td>
<td>$3,903,571</td>
<td>$19,037,997</td>
</tr>
</tbody>
</table>

The firm of Duplantier, Hrapmann, Hogan, and Maher, LLP, audits the financial records of United Way of Southeast Louisiana annually. A copy of any complete audit is available upon request.

Combined Federal Campaign for Greater New Orleans

United Way 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 5% administrative fee, with a cap of $350.00 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 designsations due to them, based on their proportionate share of the overall campaign dollars raised.
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Huber, Slack, Houghtaling,
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GarrityPrint Solutions

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Investment & Insurance Solutions

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Attorney
Cao Law Firm

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Adams and Reese LLP

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Mr. Charles L. Rice, Jr.
Enery New Orleans

Ms. Tara Richard, Esq
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Business Council of New Orleans

Mrs. Florence Schornstein

Mr. Tom Shaw
LOOP, LLC.

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Mrs. Kim Sport

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Peoples Health

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Charmaine Caccioppi
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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 Gstoel, PHR
Vice President of Human Resources and Administration
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