

# ANNUAL REPORT

## 2018-19



United Way  
of Northeast Louisiana

# BOARD OF DIRECTORS

## OFFICERS

Board Chair | Blake Wheelis  
Chair Elect | Amy Sawyer  
Secretary | Eve Van Sickle  
Treasurer | Susan Harwood  
Past Board Chair | Dr. Ron Berry

## CHAIRS

Campaign Chair | James W. Moore III  
Campaign Chairs-Elect | Stephanie & Nat Smith  
Campaign Chair (LUJP) | Richie LeBlanc  
Campaign Chair-Elect (LUJP) | Brandon Ewing  
Community Investment Chair | Stan Anderson  
Community Investment Chair (LUJP) | Adam O'Neal  
Communications Chair | Shelia Snow  
Community Impact Chair | Amy Price Sawyer  
2-1-1 Advocate | Beverly Lewis

BLAKE WHEELIS | Chair | Blake Wheelis State Farm Insurance Agency, Inc.  
DON "DJ" BANKS | Wells Fargo Advisors  
KEITH BIEDENHARN | Coca-Cola Bottling Company United  
LAKEISHA BOSWORTH | Ouachita Parish Public Library  
LISA BRADLEY | Glenwood Regional Medical Center, A Steward Family Hospital  
KEVIN A. CUPPIA | Graphic Packaging International, Inc.  
RICHARD DAVIS | Foster Farms  
BRANDON EWING | Ewing Timber, LLC  
ERNEST FINCH | Thomas & Farr Agency, Inc.  
JANICE J. GARRISON | JP Morgan Chase  
FLORENCETTA H. GIBSON, PHD | LAMFT  
WES GIBSON | CenturyLink  
JEFF GLOVER | Child View  
ALBERTA B. GREEN | ABG Professional Development Solutions  
TODD GUICE | Ouachita Parish School System  
SUSAN HARWOOD | Hulsey, Harwood & Sheridan, CPA  
CLAY G. HIPPI III | First National Bank  
COURTNEY HORNSBY | City of West Monroe  
WILLIE HUNTER JR. | Willie Hunter Jr. & Associates Attorney at Law

JOHN KAHL | St. Francis Medical Group  
BARBARA LEADER | The News-Star, a Gannett Company  
BEVERLY V. LEWIS, RN, BSN, MPA | Ochsner LSUHSC - Monroe EA Conway  
BILLY MCCONNELL | LaSalle Management Company, LLC  
JAMES W. MOORE III | InterMountain Hotels  
ADAM O'NEAL | Origin Bank  
MICHAEL RYAN, CFP | Wells Fargo Advisors  
AMY PRICE SAWYER | North Delta TitleMullens Price Sawyer, LLC  
NATHAN G. "NAT" SMITH | BancorpSouth  
STEPHANIE SMITH | Ouachita Parish Tax Assessor's Office  
SHELIA SNOW | Monroe-West Monroe Convention & Visitor's Bureau  
CORRE STEGALL | Louisiana Tech University  
RANDY STONE | KARD Fox 14 / KTVE NBC 10  
DANIEL TAYLOR | Argent Financial Group  
JEAN TOTH | Food Bank of Northeast Louisiana  
BRENT VIDRINE, PHD | Monroe City Schools  
ROD WASHINGTON | City of Monroe  
HARRINGTON WATSON III, PHD | Ouachita Parish School System  
ASHLEY WEST | Progressive Bank

# WHO WE ARE

UNITED WE FIGHT. UNITED WE WIN.

## WHAT WILL YOU FIGHT FOR?

We are the problem solvers, the hand raisers, and the game changers. We go after our community's toughest challenges and come up with new solutions to old problems, working with people from all walks of life to turn those solutions into action. It's not easy, but we never give up. And we don't do it alone.

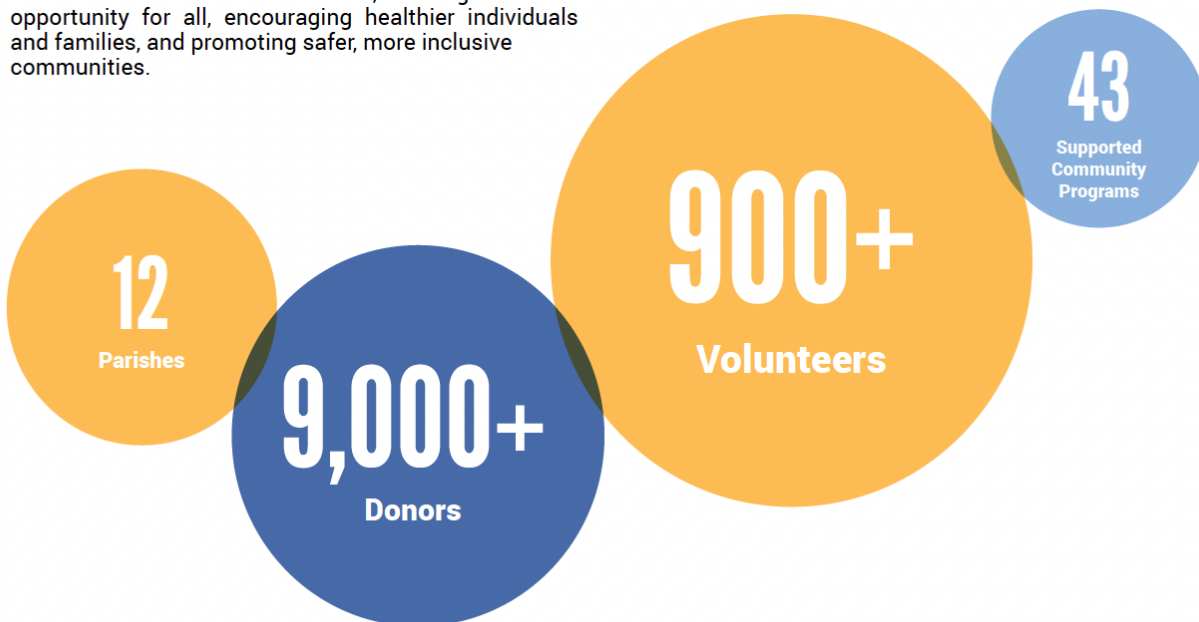
For 62 years, United Way of Northeast Louisiana has been the unifying force that brings together passionate individuals, businesses, government entities, and non-profits to effectively create positive, lasting change, improve lives, and build a stronger community. We accomplish this by mobilizing partners and resources throughout the 12-parish region in a united effort to identify and respond to our community's most critical needs.

United, we are focused on helping young people become more successful in school and life, creating economic opportunity for all, encouraging healthier individuals and families, and promoting safer, more inclusive communities.

We get results, whether through initiatives like READ. LEARN.SUCCEED., providing free community services like United Way 2-1-1 or employee engagement opportunities through our VolunteerUNITED Volunteer Engagement Center, fueling collective impact by collaborating to tackle issues like hunger (Lincoln Parish Hunger Task Force) and homelessness (United Against Homelessness), or investing in the work of our partners who are providing critical community services.

Together, we fight for the Education, Financial Stability, and Health of every person in our community.

With more than 900 volunteers and over 9,000 donors, we're powered by thousands of locals who want to help people and improve our community—now and for generations to come.



# OUR IMPACT

## COMMUNITY ASPIRATIONS & IMPACT GOALS

After Listening Tour themes were identified, the United Way Strategic Planning Committee combined this feedback with research, best practices, and expert knowledge to develop Community Impact goals and strategies to address issues community members are most passionate about.

### Children, Youth, and Young Adults Successful in School and Life

- ✓ Children Enter School Ready
- ✓ Students are Successful in Elementary School and prepared for middle/secondary school
- ✓ Youth gain the knowledge, skills, and credentials so that they are prepared for the workforce and are able to obtain family sustaining employment

### Economic Opportunity for All

- ✓ Individuals and families have adequate and sustainable resources to support their needs
- ✓ Individuals and families have the skills, knowledge, relationships, and economic pathways they need to effectively increase and manage their income
- ✓ Vulnerable populations maximize their ability to live with independence and dignity
- ✓ People/organizations continue to work together to support a thriving, prosperous, robust economy

COMMUNITY IMPACT

### Healthy and Safe Individuals, Families, and Community

- ✓ Families/individuals live in a healthy and safe environment
- ✓ People/organizations work together to strengthen and build a more inclusive community

Learn more at [unitedwaynela.org](https://unitedwaynela.org)

# OUR IMPACT

## EDUCATION

Increasing local graduation rates

24,039  
free books

Since its launch, United Way of Northeast Louisiana **READ.LEARN.SUCCEED.** has provided over 24,000 free books to local 2nd and 3rd graders in Lincoln Parish, Monroe City, Ouachita Parish, and Union Parish partner schools.

96% of **READ.LEARN.SUCCEED.** students in Lincoln Parish, Monroe City, and Ouachita Parish partner schools improved their reading skills during the 2016-2017 school year.

96%  
of **READ.LEARN.SUCCEED.** students improved their reading skills

82  
students received academic enrichment during the Summer of 2017

82 students enrolled in the **Monroe City School Summer Camp\***, providing a unique academic summer enrichment experience that helps fight summer slide (academic skill loss).

United Way Supported Programs: EDUCATION

## FINANCIAL STABILITY

Increasing income, building savings, and gaining assets

1,601

area high schoolers received financial education

During the 2016-2017 school year, 399 **United Way of Northeast Louisiana Dollars & Sense Reality Fair** volunteers provided free comprehensive financial education to 1,601 area high schoolers at events held in 27 high schools and community programs in 7 Northeast Louisiana parishes.

The **United Way ALICE Report for Louisiana**, produced as part of a collaboration of 11 Louisiana United Ways, was updated and re-released in April 2017. The report highlights a population of people who work hard, yet still struggle to make ends meet. The report found that in Northeast Louisiana, 48% of the population is **ALICE** (Asset Limited Income Constrained Employed), prompting United Way to begin laying the groundwork for strategies that help address issues faced by **ALICE**. **Learn more at [unitedwaynela.org/ALICE](http://unitedwaynela.org/ALICE).**

48%  
of Northeast Louisiana Families are ALICE

## HEALTH

Increasing access to care and preventative health and nutrition services

In 2016, **United Way of Northeast Louisiana 2-1-1** provided 1,257 referrals to clients to help meet their healthcare needs, including prescription assistance, Medicaid, mental health, dentistry, and medical equipment.

1,257  
health referrals provided

\$77,542  
prescription savings in 2016

United Way of Northeast Louisiana, in partnership with **FamilyWize**, provided free FamilyWize prescription discount cards, saving \$77,542 on prescription costs in 2016, an average of 43% savings per prescription.

## BASIC NEEDS

Increasing access to food, shelter, medicine, transportation and disaster relief

24,735  
referrals provided

In 2016, **United Way of Northeast Louisiana 2-1-1** provided 24,735 referrals to clients to help meet their needs, including basics such as food, clothing and shelter, health care, volunteer opportunities and more.

Since 2010, the **Emergency Food & Shelter Program**, a FEMA grant facilitated and administered by United Way of Northeast Louisiana, has provided over 1,375 nights of shelter and 39,876 meals/food assistance to area residents.

39,876  
meals/food assistance provided since 2010

8,580  
backpacks of food were provided to Lincoln Parish Children

United Way collaborated with the **Lincoln Parish Hunger Task Force Backpack Program\*\*** during the 2016-2017 school year to provide 8,580 bags of food to Lincoln Parish School children, who otherwise might have gone without food over the weekend.



# AWARD WINNERS

## 2018 Circle of Honor

Allen, Green & Williamson, LLP  
 ANGUS Chemical Company  
 Argent Financial Group, Inc.  
 Associated Business Printing, Inc.  
 ATMOS Energy Corporation  
 BancorpSouth  
 Bank of Ruston  
 Blake Wheelis State Farm  
 Centric Federal Credit Union  
 Coca-Cola Bottling Company UNITED  
 Community Financial Insurance Center, LLC  
 Cross Keys Bank  
 D.A.R.T  
 Don M. Barron Contractor, Inc.  
 Durrett Law and Title  
 Ensure, The Insurance Agency  
 Financial Institution Service Corporation  
 First National Bank  
 Heard, McElroy & Vestal, LLP  
 Holyfield Construction  
 Hulsey, Harwood & Sheridan, CPA  
 Hunt Forest Products, LLC  
 Iberiabank  
 Jim Taylor Auto Group  
 Lincoln Builders, Inc.  
 Little & Associates  
 Marion State Bank  
 Monroe Chamber of Commerce  
 NAI Faulk & Foster  
 North Delta Title Company  
 Origin Bank  
 Ouachita Parish Assessor's Office  
 Progressive Bank  
 Reeves, Coon & Funderburg  
 Ryan Auto Group  
 Scott Powerline & Utility Equipment, LLC  
 Southern Apparatus Services, Inc.  
 Standard Enterprises, Inc.  
 Steel Fabricators of Monroe, LLC  
 Strauss Interests, Inc.  
 The Lincoln Agency, LLC  
 Thomas & Farr Agency, Inc.  
 United Way of Northeast Louisiana  
 Wells Fargo Advisors

## 2018 New Campaign Award

Blake Wheelis State Farm  
 Centric Federal Credit Union - Ruston  
 Crossmark Management Group  
 Ewing Timber, L.L.C.  
 Fourth Judicial District Attorney's Office  
 KTVE-KARD  
 Ouachita Parish Clerk of Court  
 Ouachita Parish Farm Bureau  
 Regions Bank - Ruston  
 St. Francis Medical Center - Ruston  
 Wagner Logistics

## 2018 Going the Extra 10% Award

ATMOS Energy Corporation  
 Bancroft Bag, Inc.  
 Boys & Girls Club of North Central Louisiana  
 Capital One Bank  
 Centric Federal Credit Union  
 City of Ruston  
 Dean Morris, LLP  
 Dillard's Inc.  
 Durrett Law & Title  
 Fourth Judicial Court - OPPJ  
 Glenwood Regional Medical Center  
 Huffman & Soignier, APAC  
 Hunt, Guillot & Associates  
 JPMorgan Chase Bank, N.A.  
 Lincoln Builders  
 Lincoln Parish Police Jury  
 Lincoln Parish Schools  
 Lincoln Preparatory School  
 Little & Associates  
 Louisiana Tech University  
 Marion State Bank  
 Mid South Extrusion  
 Monroe City Schools  
 NAI Faulk & Foster  
 Newcomer, Morris & Young  
 Origin Bank  
 Ouachita Valley Federal Credit Union  
 Robertson Produce, Inc.  
 Ryan Auto Group  
 Specialty Management Services Ouachita  
 St Francis Medical Center  
 The Lincoln Agency, LLC  
 Union Parish Sheriff's Office

## Campaign Leaders Award

CenturyLink	\$869,321.00
Origin Bank	\$169,883.49
Strauss Interests, Inc.	\$132,785.00
Graphic Packaging Intl.	\$109,725.70
ANGUS Chemical Company	\$100,202.20
Foster Farms	\$83,882.00
Lincoln Parish School District	\$80,502.70
St. Francis Medical Center	\$73,768.91
BancorpSouth Bank	\$70,656.81
Entergy Louisiana	\$62,134.82

## 2018 Special Achievement Award

Dean Morris & Associates, LLP  
 Lincoln Parish School District  
 Lincoln Preparatory School  
 MJB Wood Group, Inc.  
 Newcomer, Morris & Young

## 2018 Campaign Coordinator or Team Award

Eve Van Sickle & Rebecca Mixon at SFMC and  
 Lori Mathieu at GRMC  
 Karen Knox at Jim Taylor Ford OR  
 Cristal Beardon at Marion State Bank

## 2018 LIVE UNITED Award

Little & Associates OR Coca Cola UNITED (Regional)  
 Hunt, Guillot & Associates, LLC (LPUP)

## 2018 VolunteerUNITED Award

KTVE-KARD OR City of Monroe (Regional)  
 Argent Financial Group OR Foster Farms (LPUP)

# UNITED WE FIGHT. UNITED WE WIN.

## REGIONAL

### EDUCATION

Boy Scouts Traditional Scouting (Boy Scouts, Cub Scouts, & Venturing) \$30,333.81  
 Boy Scouts Learning for Life \$22,257.92  
 Boy Scouts Multicultural Markets \$17,530.58  
 Boys & Girls Club of NELA Project Learn \$86,853.18  
 Children's Coalition Children's Coalition Early Head Start \$29,939.86  
 Girl Scouts Girl Scouting Leadership Experience \$19,697.28  
 OIC I CAN \$7,878.91  
 OIC High School Equivalence Test \$3,398.02  
 Wellspring (The) Big Brothers/Big Sisters \$37,561.92

### FINANCIAL STABILITY

ARCO Vocational Program \$16,939.66  
 OIC Career Training Program \$9,691.06  
 OIC Community Initiatives Financial Literacy \$4,977.52

### HEALTH

ARCO Early Intervention \$121,156.38  
 Med Camps of Louisiana Summer Camping \$18,357.86  
 NELA Sickle Cell Anemia Foundation Social Worker Program \$20,890.54  
 Ouachita Council On Aging Congregate Meals \$8,627.41  
 Ouachita Council On Aging In-Home Assistance \$11,030.48  
 Rays of Sonshine Substance Abuse Prevention Program for Children \$16,112.37  
 Wellspring (The) Counseling & Family Development Center \$16,793.90

### BASIC NEEDS

American Red Cross Emergency Services \$92,971.15  
 Christopher Youth Center Our House Shelter \$47,273.47  
 Food Bank Adopt-A-Senior \$22,060.95  
 Food Bank Agency \$9,454.69  
 Food Bank Backpack for Kids \$15,757.82  
 Food Bank Kid's Cabinet School Pantry \$5,631.06  
 Ouachita Council On Aging Home Delivered Meals \$52,788.71  
 Ouachita Council On Aging Transportation \$45,697.69  
 Rays of Sonshine The Zone \$3,939.46  
 St. Vincent de Paul Prescription & Counseling Services \$31,515.65  
 Wellspring (The) Domestic Violence Program \$95,728.77  
 Wellspring (The) Permanent & Transitional Housing \$27,891.28  
 West Ouachita Senior Center Senior Adult and Community Supportive Services \$98,486.39

## LUJP

### EDUCATION

Boy Scouts Multicultural Markets \$3,500.00  
 Boy Scouts Traditional Scouting \$4,000.00  
 Boys & Girls Club of North Central La Core Programming \$39,200.00  
 The Wellspring Big Brothers/Big Sisters \$40,202.92

### HEALTH

LA Methodist Children & Family Services Family Counseling Center \$38,822.27  
 Med Camps of Louisiana Summer Camping \$40,000.00  
 Northeast LA Sickle Cell Social Worker \$6,000.00  
 The Health Hut Social Services \$7,500.00

### BASIC NEEDS

American Red Cross Emergency Services \$2,500.00  
 DART Domestic Violence Program \$61,960.00  
 Food Bank Adopt-A-Senior \$22,917.00  
 Food Bank Agency \$8,000.00  
 Lincoln COA Home Delivered Meals \$30,000.00  
 St. Vincent de Paul Prescription & Counseling Services \$11,611.00  
 Union COA Congregate & Home-Delivered Meals \$23,721.13

# FINANCIAL HIGHLIGHTS

## UNITED WAY FINANCIAL HIGHLIGHTS

FOR THE YEAR ENDED JUNE 30, 2019 (Audited)

BALANCE SHEET		STATEMENT OF SUPPORT, REVENUE & EXPENSES	
Assets		Revenues	
Cash	647,781	Income from Campaign & Other Contributions	2,855,521
Investments	569,582	Income from Additional Pledges	32,950
Pledges Receivables	1,610,738	Grants, Sponsorship & Other Income	890,561
Grants & Other Receivables	308,271	<b>Total Revenue</b>	<b>\$ 3,779,032</b>
Fixed Assets	341,925		
Other Assets	8,417		
<b>Total Assets</b>	<b>\$ 3,486,714</b>		
<i>Liabilities &amp; Net Assets</i>			
Liabilities		Expenses	
Allocations & Designations Payable	895,998	Agency Services/Fund Distribution	1,280,182
Other Payables	136,426	Supporting Services	778,507
Deferred Revenue	88,463	Program Services	1,500,256
<b>Total Liabilities</b>	<b>\$ 1,120,887</b>	<b>Total Expenses</b>	<b>\$ 3,558,945</b>
Net Assets			
Unrestricted Net Assets	851,709	<b>Increase (Decrease) in Net Assets</b>	<b>\$ 220,087</b>
Temporarily Restricted Net Assets	1,514,118		
<b>Total Net Assets</b>	<b>\$ 2,365,827</b>		
<b>Total Liabilities &amp; Net Assets</b>	<b>\$ 3,486,714</b>	United Way of Northeast Louisiana is audited by the firm of Little & Associates, Certified Public Accountants, Monroe, LA.	





United Way  
of Northeast Louisiana

[unitedwaynela.org](http://unitedwaynela.org)

Monroe | 1201 Hudson Lane  
Ruston | 939 N. Trenton Street