

# ANNUAL REPORT

## 2022-23



United Way  
of Northeast Louisiana



# BOARD OF DIRECTORS

## OFFICERS

**Daniel Taylor | Chair**

Argent Financial Group

**Amy Sawyer | Past Board Chair**

North Delta Title Company Mullens Price Sawyer, LLC

**Brittany Myers | Secretary**

Drax Biomass

**Nat Smith | Treasurer**

BancorpSouth

## CHAIRS

**Rick Guillot | Campaign Chair**

Origin Bank

**Mark Kent Anderson | Campaign Chair-Elect**

Mid South Extrusion

**Cathi Cox-Boniol | LUJP Campaign Chair**

Ruston Daily Leader

**Dr. Josh Mandrell | LUJP Campaign Chair-Elect**

Green Clinic Health System

**Christine Rambo | Marketing & Communications Chair**

Up Marketing Strategies

**Marc Mashaw | United Way 211 Advocate**

Ouachita Parish Sheriff's Office

**Ashley West | Community Impact Chair**

Progressive Bank

**Alberta B. Green | Diversity, Equity, and Inclusion Chair**

ABG Professional Development Solutions

**Brian Bush**

Monroe City Schools/JS Clark Magnet

**Reverend Ike Byrd**

Mt. Zion Baptist Church

**BJay Durrett**

Durrett Law & Title

**Brandon Ewing**

Ewing Timber, LLC

**Janet Fortenberry**

Janet Fortenberry State Farm

Insurance Agency

**Janice J. Garrison**

JP Morgan Chase

**Florencetta H. Gibson, PhD**

LA Association for Marriage & Family  
Therapy (LAMFT)

**Ernest Green**

Angus Chemical Company

**Todd Guice**

Ouachita Parish School System

**Kelly Hogan**

Community Volunteer

**Courtney Hornsby**

City of West Monroe

**Beverly V. Lewis, RN, BSN, MPA**

Ochsner LSUHSC - Monroe EA Conway

**Ella Nimmers**

Christopher Youth Center

**Pastor Vance Price**

Community Family of Faith Church

**Pamela Saulsberry, P.h.D.**

University of Louisiana Monroe

**Cindy Shaw**

SMSO

**Kevin Smith**

Regions Financial Corp.

**Kristen Shambro**

Centric Federal Credit Union

**Nathan G. "Nat" Smith**

BancorpSouth

**Stephanie Smith**

Ouachita Parish Tax Assessor's Office

**Corre Stegall**

Louisiana Tech University, Retired

**Randy Stone**

KARD Fox 14 / KTVE NBC 10

**Victor Vidaurre**

St. Francis Medical Center

**Juanita Woods**

NOVA

# ASPIRATIONS & GOALS



## CHILDREN, YOUTH, & YOUNG ADULTS SUCCESSFUL IN SCHOOL AND LIFE

**GOAL:** Children enter school ready.

**GOAL:** Students are successful in elementary school and prepared for middle/secondary school.

**GOAL:** Youth gain the knowledge, skills, and credentials so that they are prepared for the workforce and able to obtain family sustaining employment.

## HEALTHY & SAFE INDIVIDUALS, FAMILIES, AND COMMUNITIES

**GOAL:** Families/individuals live in a healthy and safe environment.

**GOAL:** People/organizations work together to strengthen and build a more inclusive community.

## ECONOMIC OPPORTUNITY FOR ALL

**GOAL:** Individuals and families have adequate and sustainable resources to support their needs.

**GOAL:** Individuals and families have the skills, knowledge, relationships, and economic pathways they need to effectively increase and manage their income.

**GOAL:** Vulnerable populations maximize their ability to live with independence and dignity.

**GOAL:** People/organizations continue to work together to support a thriving, prosperous, robust economy.



# OUR IMPACT

## READ.LEARN.SUCCEED.



Dr. Pamela Saulsberry with Students  
at Carver Elementary School



Provides children with passionate, positive role models for reading and education - **448 students**



Builds a sense of community and support for education within the school and surrounding area - **92 companies/organizations represented**



Allows volunteers to make a difference in the lives of children and contribute to society - **411 volunteers/1800 hours**



Helps bridge the achievement gap by providing additional resources and support to underprivileged or at-risk children - **896 connections to resources**

## PARTNER AGENCY PROGRAMS

Our partner programs have a proven track record of success in helping youth achieve their goals. Recent reports show:



**100% of students** tracked in their final year of school graduated on time, demonstrating a strong commitment to academic success

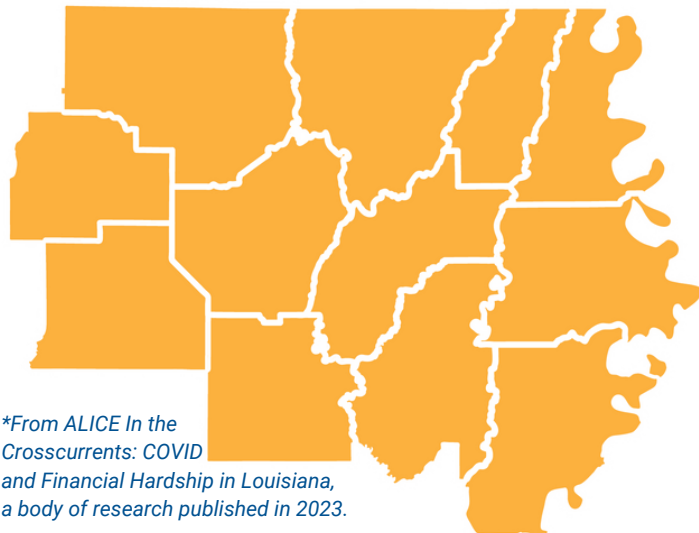


**99% of students** who received soft skill development showed improvements, highlighting the importance of these skills for future success



**90% of children and youth** in programs that track attendance showed an improvement, demonstrating the effectiveness of monitoring and intervention in promoting regular attendance

## ALICE - ASSET LIMITED. INCOME CONSTRAINED. EMPLOYED



\*From ALICE In the Crosscurrents: COVID and Financial Hardship in Louisiana, a body of research published in 2023.

Of the 1,776,260 households in Louisiana, 51% had income below the ALICE Threshold of Financial Survival in 2021, the second-highest rate in the U.S.

### STATE DATA:

ALICE OR BELOW:

51%

32%

ALICE

19%

POVERTY

### NELA DATA:

ALICE OR BELOW:

60%

33%

ALICE

27%

POVERTY

# OUR IMPACT



**658 individuals were provided with tools to help them manage money and make informed financial decisions in 2022.**

## FINANCIAL COUNSELING

It is estimated that each dollar spent on financial counseling yields **\$7** in benefits to consumers. That is a **\$1,111,314** benefit for our Northeast Louisiana community.



**3,824 HOURS** of financial education provided to individuals in 2022



### VITA

(Volunteer Income Tax Assistance)

This program offers free tax preparation and e-filing services to individuals and families who meet the household income thresholds set by the IRS. VITA tax preparers are certified by the IRS and save people money by not having to pay fees associated with tax preparation.



### DOLLARS AND \$ENSE

The United Way of Northeast Louisiana Dollars and \$ense is a financial education simulation through which young people actively learn how to make better financial decisions and gain knowledge of budgeting, saving, and spending.



### THE HEIRSHIP PROJECT

After experiencing multiple disasters, United Way of NELA launched The Heirship Project to provide education, outreach, and support to those with heir property and title issues so residents will have proof of ownership to apply for recovery funds and personally secure their property for the future.

## BANKON NELA

According to BankOn Coalition research, as of 2019, **49.6%** of households in Northeast Louisiana were unbanked or underbanked.

27.3%

**UNBANKED**

22.3%

**UNDERBANKED**

## 211

### WHAT DID 211 DO IN 2022?

- In 2022, United Way NELA 211 made **33,388** referrals to resources in our community.
- United Way NELA 211 online database had **831 hits**.
- From those visits, **2,878** resources were searched.

### WHAT WERE THE TOP CALLS PLACED TO 211?

- Electric service payment assistance
- Food pantries
- Rent assistance





# 2022 Celebrating Excellence

## LIVE UNITED AWARD

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### REGIONAL

Drax

**LINCOLN, UNION, JACKSON PARISHES**

Northern Louisiana Medical Center



### REGIONAL

JP Morgan Chase

**LINCOLN, UNION, JACKSON PARISHES**

Bill Hogan and Jessica Slaughter - Century Next Bank



**REGIONAL:** Kristen Shambro - Centric Federal Credit Union

**LINCOLN, UNION, JACKSON PARISHES:**

Pastor George Lee IV - The Springs.Life / Temple Baptist Church

## CAMPAIGN COORDINATOR & TEAM AWARD

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### REGIONAL

Scott McCain and Team - alli Management Solutions

## CAMPAIGN COORDINATOR OF THE YEAR AWARD

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### REGIONAL

Lisa Tarver, RN, BSN and Angela Grubbs - Glenwood Regional Medical Center

**LINCOLN, UNION, JACKSON PARISHES**

Adarian Williams - Grambling State University

## CAMPAIGN LEADERS AWARD

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Origin Bank, ANGUS Chemical Company, Graphic Packaging International, Argent Financial Group, Progressive Bank, Ouachita Parish School Board, Strauss Interests, Inc., Louisiana Tech University, alli Management Solutions, and University of Louisiana Monroe




# 2022 Award Winners


4th Judicial District Attorney's Office

4th Judicial District Court - Judges


 Acadian Ambulance Service


 AIMS, Inc.


 Allen, Green & Williamson, LLP

 alli Management Solutions


 Amcor

 ANGUS Chemical Company

 ARC OF OUACHITA


 Argent Financial Group, Inc.


Arthur J. Gallagher

 Associated Business Printing, Inc.

ATMOS Energy Corporation

b1BANK

 Bancroft Bag, Inc.


 Bank of Oak Ridge

 Benoit Ford


Berry Global, Inc.


 Blake Wheelis State Farm

Boy Scouts Louisiana Purchase Council

 Boys & Girls Club of Northeast Louisiana

Brookshire Grocery Company

 Business Alliance Financial Services

 Cadence Bank

Cameron, Hines & Company, APAC

 Car Town

 CenterPoint Energy

 Centric Federal Credit Union

 Century Next Bank


 Christopher Youth Center

 Citizens Progressive Bank

City of Monroe

City of Ruston

 City of West Monroe

 Community Financial Insurance Center, LLC

Courtesy Automotive Team


 CREED & CREED


 Cross Keys Bank

Crossmark Management Group

 D.A.R.T.

 Dean Morris, LLC


 Dewitt & Giger, LLP

 Don M. Barron Contractor, Inc.


 Drax

 Durrett Law & Title


Emprint Moran Printing, Inc.

 Ensure, The Insurance Agency

Entergy Louisiana

 Ewing Timber

Financial Institution Service Corporation

 First Horizon Bank

Food Bank of Northeast Louisiana

 Glenwood Regional Medical Center

 Grambling State University

 Graphic Packaging International


Green Clinic Health System

 Heard, McElroy, & Vestal

HiTech Computers of Ruston, Inc.

 Holyfield Construction

 Homeland Bank

 Hulsey, Harwood & Sheridan, CPA

 Hunt Forest Products

 Hunt, Guillot & Associates, LLC

 Impact Healthcare Solutions

InterMountain Management

 Jackson Parish Correctional Center

 Jackson Parish Sheriff's Office

James Machine Works

 Jim Taylor Buick GMC

 Jim Taylor Chevrolet

 Jim Taylor Ford Lincoln

 JP Morgan Chase

# 2022 Award Winners

KTVE 10 NBC / KARD FOX 14

LaSalle

Management, M&T Properties,  
and Correct Solutions Group

Lazenby & Associates, Inc.

The Lincoln Agency

Lincoln Builders, Inc.

Lincoln Parish Police Jury

Lincoln Parish School District

Lincoln Preparatory School

Little & Associates

Louisiana Delta Community  
College

Louisiana National Bank

Louisiana Tech University

Lumen

Marion State Bank

McKinney Saw and Cycle, Inc.

Merrill Lynch Wealth  
Management

Mid South Extrusion

Monroe Chamber of  
Commerce

Monroe City Schools

Monroe Coca-Cola Bottling  
Company UNITED

Monroe Housing Authority

NAI Faulk & Foster

Newcomer, Morris & Young

North Delta Title Company

Northeast Louisiana Cancer  
Institute

Northern Louisiana  
Medical Center

Origin Bank

Ouachita Parish Assessor's  
Office

Ouachita Parish Clerk of  
Court

Ouachita Parish Police Jury

Ouachita Parish Public  
Library

Ouachita Parish Public Works

Ouachita Parish School  
Board

Ouachita Parish Sheriff's  
Office

Ouachita Valley Federal Credit  
Union

Peoples Bank

Peregrine Corporation

Polaris of Ruston

Progressive Bank

Radiology Associates

Raymond James

Reeves, Coon & Funderburg

Regions Financial Corporation

Robertson Produce, Inc.

Roseburg Forest Products

Ruston Glass & Mirror

Ryan Auto Group

S.E. Huey Co.

Scott Equipment Companies

Scott Powerline & Utility  
Equipment, LLC

Snellings, Breard,  
Sartor, Inabnett & Trascher,  
LLP

Southern Apparatus  
Services, Inc

St. Francis Medical Center

Standard Enterprises, Inc.

State Combined Charitable  
Campaign

Steel Fabricators of  
Monroe, LLC

Strauss Interests, Inc.

The Health Hut

The Wellspring Alliance for  
Families

Thomas & Farr Agency, Inc.

Union Council on Aging

Union General Hospital

Union Parish Schools

United Way of  
Northeast Louisiana

University of Louisiana  
Monroe

Van-Trow, LLC

Wagner Logistics

Walpole Tire & Service

Wells Fargo Advisors

WestRock Hodge Mill



# VOLUNTEER DIRECTED DOLLARS



| Row Labels   | Sum of 2022-2023 Allocation Amount |
|--|------------------------------------|
| ARCO   | 38,298.38                          |
| ARCO Customized Employment                                 | 38,298.38                          |
| Boy Scouts   | 78,000.00                          |
| Traditional Scouting (Boy Scouts, Cub Scouts, & Venturing) | 78,000.00                          |
| Boys & Girls Club of NELA                                  | 75,000.00                          |
| Project Learn  | 75,000.00                          |
| Boys & Girls Club of North Central                         | 55,000.00                          |
| Core Programming   | 55,000.00                          |
| Catholic Charities   | 24,224.64                          |
| Family Strengthening*                                      | 24,224.64                          |
| Children's Coalition                                       | 30,000.00                          |
| Early Head Start   | 30,000.00                          |
| Christopher Youth Center                                   | 32,882.55                          |
| Emergency Youth Shelter                                    | 17,000.00                          |
| Transitional Living*                                       | 15,882.55                          |
| DART   | 68,160.00                          |
| Domestic Violence Program                                  | 68,160.00                          |
| Food Bank  | 62,618.92                          |
| Agency Partner Program                                     | 13,138.56                          |
| Backpack for Kids  | 15,000.00                          |
| Senior Program   | 34,480.36                          |
| Girl Scouts  | 20,000.00                          |
| Girl Scouting Leadership Experience                        | 20,000.00                          |
| Health Hut (The)   | 10,000.00                          |
| Lab Fees for the Uninsured                                 | 10,000.00                          |
| LA Methodist Children & Family Services                    | 52,030.00                          |
| Family Counseling Center                                   | 44,530.00                          |
| Special Needs Equine Therapy*                              | 7,500.00                           |
| Lincoln Council On Aging                                   | 30,000.00                          |
| Home Delivered Meals                                       | 30,000.00                          |
| Med Camps of Louisiana                                     | 63,497.80                          |
| Summer Camping   | 63,497.80                          |
| NELA Sickle Cell Anemia Foundation                         | 19,000.00                          |
| Social Service Provision                                   | 9,000.00                           |
| Social Worker  | 10,000.00                          |
| OIC  | 34,681.60                          |
| Business Management and Technology*                        | 14,681.60                          |
| High School Equivalence Test                               | 20,000.00                          |
| Ouachita Council On Aging                                  | 58,986.96                          |
| Congregate Meals   | 5,399.12                           |
| Home Delivered Meals                                       | 25,692.80                          |
| Homemaker Program  | 8,074.88                           |
| Transportation (Non-Emergency Medical)                     | 19,820.16                          |
| Rays of Sunshine   | 15,648.02                          |
| Project Hope   | 12,148.02                          |
| The Zone   | 3,500.00                           |
| Salvation Army   | 10,000.00                          |
| Salvation Army Shelter Support*                            | 10,000.00                          |
| St. Vincent de Paul  | 75,370.05                          |
| Prescription & Counseling Services                         | 75,370.05                          |
| Union Council On Aging                                     | 26,193.00                          |
| Congregate & Home Delivered Meals                          | 26,193.00                          |
| Wellspring (The)   | 170,427.91                         |
| Counseling & Family Development Center                     | 13,000.00                          |
| Domestic Violence Program                                  | 67,727.64                          |
| Rural Vicim Services                                       | 18,559.48                          |
| Youth Empowerment Program (YEP)                            | 71,140.00                          |
| West Ouachita Senior Center                                | 73,408.00                          |
| Senior Adult and Community Supportive Services             | 73,408.00                          |
| <b>Grand Total</b>   | <b>1,123,426.93</b>                |



|  |                                    |    |
|--|------------------------------------|----|
| UWNELA   | L/U/J                              | -Y |
| Row Labels   | Sum of 2022-2023 Allocation Amount |    |
| Children, Youth and Young Adults Successful in School and Life | 108,200.00                         |    |
| Economic Opportunity for All                                   | 40,000.00                          |    |
| Healthy and Safe Individuals, Families and Community           | 273,883.00                         |    |
| <b>Grand Total</b>   | <b>422,083.00</b>                  |    |

|  |                                    |    |
|--|------------------------------------|----|
| UWNELA   | Regional                           | -Y |
| Row Labels   | Sum of 2022-2023 Allocation Amount |    |
| Children, Youth and Young Adults Successful in School and Life | 225,940.00                         |    |
| Economic Opportunity for All                                   | 237,701.93                         |    |
| Healthy and Safe Individuals, Families and Community           | 15,648.02                          |    |
| Healthy and Safe Individuals, Families and Community           | 222,053.98                         |    |
| <b>Grand Total</b>   | <b>701,343.93</b>                  |    |



UNITED WAY OF NORTHEAST LOUISIANA

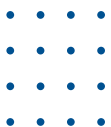
# FINANCIAL HIGHLIGHTS



## UNITED WAY FINANCIAL HIGHLIGHTS

FOR THE YEAR ENDED JUNE 30, 2023 (Audited)

| BALANCE SHEET                             |                     | STATEMENT OF SUPPORT, REVENUE & EXPENSES  |                     |
|---|---------------------|---|---------------------|
| Assets                                    |                     | Revenues  |                     |
| Cash                                      | 2,291,208           | Income from Campaign & Other Contributions  | 2,814,215           |
| Investments                               | 588,557             | Income from Additional Pledges  | 58,186              |
| Pledges Receivables                       | 1,290,846           | Grants, Sponsorship & Other Income  | 1,675,175           |
| Grants & Other Receivables                | 77,201              | <b>Total Revenue</b>  | <b>\$ 4,547,576</b> |
| Fixed Assets                              | 273,622             |   |                     |
| Right-of-use lease asset                  | 80,160              |   |                     |
| Other Assets                              | 10,381              |   |                     |
| <b>Total Assets</b>                       | <b>\$ 4,611,975</b> |   |                     |
| Liabilities & Net Assets                  |                     |   |                     |
| Liabilities                               |                     | Expenses  |                     |
| Allocations & Designations Payable        | 418,073             | Agency Services/Fund Distribution   | 1,267,485           |
| Other Payables                            | 112,108             | Supporting Services   | 968,888             |
| Refundable advances (Deferred Revenue)    | 743,633             | Program Services  | 2,305,835           |
| Lease liability                           | 80,160              | <b>Total Expenses</b>   | <b>\$ 4,542,208</b> |
| <b>Total Liabilities</b>                  | <b>\$ 1,353,974</b> |   |                     |
| Net Assets                                |                     | Increase (Decrease) in Net Assets   |                     |
| Unrestricted Net Assets                   | 1,800,743           |   | <b>\$ 5,368</b>     |
| Temporarily Restricted Net Assets         | 1,457,258           |   |                     |
| <b>Total Net Assets</b>                   | <b>\$ 3,258,001</b> |   |                     |
| <b>Total Liabilities &amp; Net Assets</b> | <b>\$ 4,611,975</b> | United Way of Northeast Louisiana is audited by the firm of<br>Heard McElroy & Vestal, LLC, Certified Public Accountants, Monroe, LA. |                     |



UNITED WAY OF NORTHEAST LOUISIANA



United Way  
of Northeast Louisiana

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

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