



**UNITED WAY**  
Southwest  
Louisiana

Inaugural  
**ALICE Summit**

L'AUBERGE LAKE CHARLES

**MARCH 26, 2025**

8 AM - 4 PM

**Asset Limited, Income Constrained, Employed**

[unitedwayswla.org/alicesummit](http://unitedwayswla.org/alicesummit)

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On behalf of United Way Southwest Louisiana, it is with immense joy and excitement that we welcome you to our Inaugural ALICE Summit! We believe that we are at our strongest when we come together in collaboration. The board, our dedicated team members, and our esteemed community partners are truly grateful to have such passionate and diverse leaders with us today at L'auberge Lake Charles for this inspiring event.

We aspire for you to:

- Expand your professional knowledge and discover best practices
- Engage in meaningful discussions about pressing issues and trends, sharing your unique insights while forging strong connections with your peers
- Learn from a fantastic lineup of national, state, and local experts who are generously sharing their wisdom at this inaugural gathering

We are inspired by the power of innovation to tackle the complex needs of individuals and families who are ALICE (Asset Limited, Income Constrained, Employed). Despite the significant challenges many families in Louisiana face in their pursuit of financial security, it is essential for us to celebrate the remarkable programs and services making a difference throughout our state.

Together we will explore how employers are supporting their teams, how communities are creatively developing affordable housing options, how legislators are advocating for impactful policy changes, and how a diverse array of organizations across the south are reaching out to support tens of thousands of individuals and families in the ALICE population.

Our vision is to cultivate an empowered southern network that employs research and data to uncover innovative, bold, and effective solutions to help individuals and families achieve financial prosperity.

This Summit represents a significant step toward realizing that vision. We are proud to showcase thought leaders from across the state, and country, who will share their valuable insights, experiences, and best practices in support of ALICE. Through a range of presentations, engaging discussions, and practical toolkits, we aim to provide attendees with enriching learning experiences that enhance your understanding of the challenges faced by those on the ALICE threshold, while equipping you with innovative solutions to help dismantle these barriers.

We extend our heartfelt gratitude to our sponsors and partners for their steadfast support and unwavering commitment to our cause. This impactful event could not be possible without their generosity.

Lastly, we want to express our sincere appreciation to our exceptional team, whose passion, dedication, and integrity shine through every day, and to our outstanding conference planning team, including staff and special consultants, for their remarkable efforts in bringing this inaugural event to life. Thank you for being a part of this momentous occasion!

Enjoy the summit!



Denise Durel  
President & CEO  
United Way Southwest Louisiana



# FUELING GOOD.

CITGO has been Fueling Good in Southwest Louisiana since 1944, supporting our surrounding community and all the people who call it home.



# ALICE Summit Agenda

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**8:00-9:00 AM**

## Registration & Exhibitors

Start the day by connecting with local organizations and exploring resources that support ALICE families.

**9:00-9:15 AM**

## Opening Speaker

- DENISE DUREL, President & CEO, United Way Southwest Louisiana

**9:15-9:25 AM**

## Welcome Address

- MAYOR NIC HUNTER, City of Lake Charles

**9:25-10:00 AM**

## Keynote Address

- DR. STEPHANIE HOOPES, National Director, United For ALICE

Dr. Hoopes will provide an in-depth look at the ALICE landscape, highlighting the data-driven insights that shape policy and community action.

**10:10-10:30 AM**

## Special Presentation Strengthening Louisiana's Workforce

- SECRETARY SUSANA SCHOWEN, Louisiana Workforce Commission

Secretary Schowen will discuss Louisiana's workforce priorities, opportunities for collaboration, and the importance of working closely with the nonprofit and service sectors to support ALICE families.

**10:30-11:30 AM**

## Panel #1: Building Resilience Strengthening Working Families in Post-Hurricane Louisiana

- PATTY RIDDLEBARGER, Vice President of Corporate Social Responsibility, Entergy Corporation

### Panelists

- TRISTI CHARPENTIER, Vice President People-Centered Initiatives, Huey & Angelina Wilson Foundation
- DR. STEPHEN BARNES, Executive Director, Blanco Public Policy Center
- DR. DAVID LAFARGUE, Executive Director of Workforce Solutions, SOWELA Technical Community College

### Moderator

- SARAH BERTHELOT, CEO, Louisiana Association of United Ways

This panel will follow Secretary Schowen's presentation and examine the landscape for funders, workforce development professionals, service providers, and post-secondary education experts. Panelists will discuss the pipeline of support needed to create a thriving workforce in Louisiana, strategies for overcoming workforce barriers, and how to better connect ALICE individuals with long-term career prospects.

**11:30 AM-12:30 PM**

## Break & Lunch



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**12:30-1:30 PM**

**Fireside Chat**

**Shaping Opportunities for Working Families  
Through Policy & Advocacy**

- LOUISIANA STATE REPRESENTATIVE JASON HUGHES, District 100
- JAN MOLLER, Executive Director, Invest In Louisiana
- SUSAN EAST NELSON, J.D., Executive Director, Louisiana Partnership for Children & Families

This discussion will explore the federal and state policy landscape, highlighting what participants can expect from the Louisiana legislative session and the challenges in advancing policies that benefit ALICE families. The panel will also touch on advocacy strategies for expanding early education and childcare initiatives, ensuring access to key support systems for working families.

**1:40-2:50 PM**

**Panel #2: A Home for the Future  
Addressing Housing & Transportation Challenges  
for Louisiana's Working Families**

**Panelists**

- NORMAN MORRIS, CEO, Louisiana Realtors Association
- LOUIS RUSSELL, Housing Development Administrator, Louisiana Housing Corporation
- DR. SHAWN WILSON, Former Secretary, Louisiana Department of Public Transportation & Development

**Moderator**

- HOLLY HOLLAND, Public Information Officer, Calcasieu Parish School System

Housing and transportation experts will examine the critical issues of housing affordability and transportation access, both essential to economic sustainability for ALICE families. Panelists will discuss policy solutions, community-led initiatives, and infrastructure investments needed to ensure working families can live and commute affordably.

**3:00-3:50 PM**

**Panel #3: CEO Roundtable  
A Look at ALICE in Action**

**Panelists**

- KEN OLDHAM, President & CEO, United Way of Frederick County, Maryland
- DENISE DUREL, President & CEO, United Way Southwest Louisiana

**Moderator**

- HEATHER DAVIDSON, Senior Advisor, Cloud 9 Nonprofit Advisors

Leaders from United Ways in the Southeast Region will share insights on driving ALICE-focused initiatives, gaining community buy-in, overcoming challenges, and fostering partnerships with unexpected partners. The discussion will highlight lessons learned and strategies for elevating ALICE in community conversations, focusing on Southwest Louisiana's vision for moving the needle on ALICE locally.

**3:50-4:00 PM**

**Closing Comments**

Reflect on the day's discussions and discover how you can contribute to the future of ALICE families in Southwest Louisiana.

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*Learn more...*

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# Emcee

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**Mary Leach Werner**

Chairman

Sweet Lake Land & Oil Company and the North American Land

As Chairman of Sweet Lake Land & Oil and the North American Land companies she works with company leadership overseeing land management, farming, real estate operations and their hospitality businesses. Mary also serves on the board of CKX Lands, Inc and the Committee of 100 of Louisiana.

# Welcome

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**Nic Hunter**

Mayor

City of Lake Charles

Louisiana

A lifelong Lake Charles resident, he was elected mayor in 2017. He has focused on infrastructure improvements, park revitalization, and economic development, including Port Wonder, a major lakefront project opening in 2025. He played a key role in securing federal disaster aid following the 2020-2021 storms. Committed to philanthropy, he supports children, veterans, and disaster relief efforts. He has been a steadfast advocate for Lake Charles, leading with vision and resilience.

# Keynote Speaker

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**Dr. Stephanie Hoopes**

National Director, United for ALICE

United Way of Northern New Jersey

The National Director of United For ALICE and Chief Research and Impact Officer at United Way of Northern New Jersey, she developed the ALICE measures while at Rutgers University-Newark, shaping a national framework for understanding financial hardship. A London School of Economics graduate, her research has gained national recognition, including a feature on Matter of Fact with Soledad O'Brien.

# Strengthening Louisiana's Workforce



**Susana Schowen**  
Secretary  
Louisiana Workforce Commission

Appointed in January 2024 by Governor Jeff Landry, she serves as Secretary of the Louisiana Workforce Commission. With experience at the Louisiana Community and Technical College System and Louisiana Economic Development, she focuses on aligning education with workforce needs. She collaborates across agencies and regional partners to improve workforce systems and better integrate social services with workforce development programs.

## Quote from the United Way Southwest Louisiana Survey of ALICE Families

"I receive no child support. Groceries have skyrocketed and my pay has not kept up at all. I feel like assistance needs to be on a sliding scale so more folks like me could participate. Summer is hard having a 9 year old needing day care or enrichment that I can't afford. I would like to see affordable care for single parents."



# Building Resiliency Panel

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## Strengthening Working Families in Post-Hurricane Louisiana



### **Patty Riddlebarger**

Vice President of Corporate Social Responsibility  
Entergy Corporation

As Vice President of Corporate Social Responsibility at Entergy Corporation, she leads initiatives that create sustainable value for employees, customers, and communities. With over 20 years of experience in energy, utilities, and nonprofits, she has spearheaded programs like the Power of Hope Fund, which raised \$4.2 million for Hurricane Katrina relief, and EITC Super Tax Day, securing \$300 million in refunds for low-income households.

A Tulane MBA graduate and University of Texas journalism alum, she has received 40+ awards for her work and was named one of the top 10 Latina corporate executives in the U.S. by Latina Style Magazine. She lives in New Orleans with her husband and two sons.

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### **Tristi Charpentier**

Vice President for People-Centered Initiatives  
Huey & Angelina Wilson Foundation

As Vice President of People-Centered Initiatives at Huey and Angelina Wilson Foundation, she supports grantees, fosters strategic partnerships, and advances programs for returning citizens, impoverished individuals, and ALICE families. A Louisiana State University graduate with bachelor's and master's degrees in mass communication, she is a dedicated community leader. Her volunteer work includes serving as 90th President of the Junior League of Baton Rouge, Co-Chair of the Louisiana Asset Funders Network, and a member of the ALICE Research Advisory Committee. She lives in Gonzales, La., with her husband and two children.



### **Dr. Stephen Barnes**

Executive Director  
Kathleen Babineaux Blanco Public Policy Center  
University of Louisiana at Lafayette

Dr. Stephen Barnes is the Executive Director of the Kathleen Babineaux Blanco Public Policy Center at the University of Louisiana at Lafayette and an associate professor of economics in the B.I. Moody III College of Business Administration. He serves as the independent economist on the Louisiana Revenue Estimating Conference, guiding state budget projections. Dr. Barnes has collaborated with federal and state agencies, industry partners, and scholars on economic research spanning education, health care, environmental risks, and transportation. He holds a BS in economics from LSU and an MS and PhD in economics from the University of Texas at Austin.



### **Dr. David LaFargue**

Executive Director of Workforce Solutions  
SOWELA Technical Community College

Dr. David LaFargue is the Executive Director for Workforce Solutions at SOWELA Technical Community College, overseeing customized training, talent development, and workforce solutions in Southwest Louisiana. He previously served as LaSTEM and Cybersecurity Program Administrator at the Louisiana Board of Regents, leading strategic planning, alignment, and fundraising efforts. With over 25 years of experience spanning industrial operations, higher education, and workforce development, he has held roles as faculty, department chair, and dean. Dr. LaFargue holds a doctorate in Educational Leadership, with research focused on STEM education using augmented and virtual reality as learning tools.





**Sarah Berthelot**  
 President & CEO  
 Louisiana Association of United Ways

With 29 years of nonprofit experience, she leads statewide impact initiatives that leverage technology and partnerships to enhance human service delivery. As President and CEO of the Louisiana Association of United Ways, she introduced ALICE to Louisiana in 2016 and serves as the state's ALICE Project Lead. She also advances the Louisiana 211 Statewide Network, ensuring residents can access vital resources. She and her husband, Jon, live in Youngsville with their two children.



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*Louisiana*

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 Because you've got the compassion of  
 the cross, the security of the shield,  
 and the comfort of Blue behind you.

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# Policy Fireside Chat

## Shaping Opportunities for Working Families Through Policy & Advocacy



**Louisiana State Representative Jason Hughes**  
State Representative  
District 100

As State Representative for House District 100, he serves as Vice Chair of the House Appropriations Committee and is a senior member of key House committees. He has led bipartisan legislation, including a statewide constitutional amendment.



**Jan Moller**  
Executive Director  
Invest in Louisiana

As Executive Director of Invest in Louisiana since 2011, he works to eliminate racial barriers and advance state policy. A former award-winning journalist, he is an expert in budget, tax policy, health care, and the public safety net.



**Susan East Nelson, J.D.**  
Executive Director  
Louisiana Partnership for Children & Families

As Executive Director of the Louisiana Partnership for Children and Families, she advocates for child-serving organizations. Since 2022, she has secured \$27M for early childhood mental health and helped establish Louisiana's Office of the Ombuds for Children.



Solutions for a  
better tomorrow  
in Southwest Louisiana



United Way Southwest Louisiana fights for **Financial Security, Youth Opportunity, Healthy Community** and **Community Resiliency** of **EVERY** person in our parishes.

**Give | Advocate | Volunteer**

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



*Join us!*



**UNITED  
we've got this!**

# A Home for the Future

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## Addressing Housing & Transportation Challenges for Louisiana's Working Families



**Norman Morris**  
CEO  
Louisiana Realtors Association

The Chief Executive Officer of Louisiana REALTORS®, bringing over 30 years of experience in trade associations. A Louisiana Tech University and Southeastern Louisiana University graduate, he holds the Certified Association Executive designation and the REALTOR® Association Certified Executive credential. Active in political advocacy and nonprofit fundraising, he has supported initiatives like the Muscular Dystrophy Association.



**Louis Russell**  
Housing Development Administrator  
Louisiana Housing Corporation

With 17+ years in multi-family affordable housing development, he serves as Housing Development Administrator at Louisiana Housing Corporation, overseeing Low-Income Housing Tax Credit programs and federal funding for affordable housing.



**Dr. Shawn Wilson**  
Former Secretary  
Louisiana Department of Transportation & Development

A transformative leader with extensive experience in government and the nonprofit sector, he is known for fostering collaboration and driving strategic execution. After 28 years in public service, he retired as Secretary of Louisiana DOTD and later ran for Governor in 2023, finishing second. He now serves as Senior Vice President and National Highway Business Leader at WSP USA, focusing on infrastructure, transportation, and policy initiatives that create measurable impact.



**Holly Holland**  
Public Information Officer  
Calcasieu Parish School Board

As Public Information Officer for the Calcasieu Parish School Board, she has led district communications for over nine years, navigating natural disasters and leadership transitions. She is President of the Louisiana School Public Relations Association.

# ALICE® IN SWLA

When working isn't enough to make it work.

For a growing number of U.S. households, financial stability is nothing more than a pipe dream, no matter how hard their members work. These households are **ALICE** – **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed – earning above the Federal Poverty Level yet struggling to afford basic expenses.

**50,690 HOUSEHOLDS**  
in Southwest Louisiana live below the ALICE Threshold

	ALICE HOUSEHOLDS	POVERTY HOUSEHOLDS	BELOW THE ALICE THRESHOLD
ALLEN PARISH	2,745	1,600	57%
BEAUREGARD PARISH	3,299	1,984	39%
CALCASIEU PARISH	20,383	13,802	44%
CAMERON PARISH	677	184	39%
JEFF DAVIS PARISH	4,140	1,876	51%
<b>SOUTHWEST LOUISIANA</b>	<b>31,244</b>	<b>19,446</b>	<b>46%</b>

**51%**  
FAMILIES  
LIVING  
BELOW  
THE ALICE  
THRESHOLD  
IN LOUISIANA



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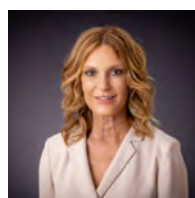
# ALICE in Action

## Innovative Leadership for Lasting Impact



**Ken Oldham**  
President & CEO  
United Way of Frederick County  
Maryland

An experienced nonprofit executive, he has served as President & CEO of United Way of Frederick County (UWFC) since 2016. He leads the organization's long-term vision and strategy, focusing on supporting ALICE (Asset Limited, Income Constrained, Employed) families in health, education, and financial stability. Under his leadership, UWFC launched the Prosperity Center's Pathway to Financial Stability, expanded charitable giving through the Unity Campaign, and provided critical COVID-19 relief. In 2023, UWFC was recognized as one of Frederick County's 50 most innovative companies.

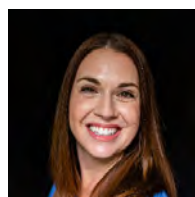


**Denise Durel**  
President & CEO  
United Way Southwest Louisiana

Denise Durel began her experience in the non-profit arena as a volunteer working with various agencies trying to better the community of Broussard where she was a working mom busy raising her family. Little did she know that her involvement with the Muscular Dystrophy Association would lead to a 20-year professional career with that organization.

Starting as a Program Coordinator handling special events in outlying parishes, including the creation of the CITGO MDA golf classic in Lake Charles, she then became the District Director overseeing the 15 parishes that make up Southwest Louisiana. After the success of achieving the #1 Director position in the country, she was named the Director of the Greater Cincinnati area. While in Cincinnati she went on to manage a region for MDA that included 8 different district areas within 4 states. After 20 years with MDA, she was named the Development Director for United Cerebral Palsy and was introduced to the United Way system.

In 2009 she relocated to Lake Charles to accept the position of President and CEO of United Way Southwest Louisiana, a position that she continues to hold today.



**Heather Davidson**  
Senior Advisor  
Cloud 9 Nonprofit Advisors

Heather Davidson is a Senior Advisor at Cloud 9 Nonprofit Advisors, dedicated to promoting economic prosperity for working families. As Director of Public Policy and Strategic Initiatives at United Way of Broward County, she led the ALICE initiative and served as a key lead and strategist at the state level alongside United Way of Florida, educating stakeholders and building consensus statewide. A passionate community organizer, Heather specializes in stakeholder engagement, policy advocacy, and creating systemic change. She continues to support the United Way network in implementing innovative strategies for ALICE families. Heather holds a Master's in Public Policy and Administration from Northwestern University.

# Tailored ALICE Presentations for your organization

Having a United Way Southwest Louisiana team member who is an expert on local ALICE families speak to your company or organization can provide invaluable insights and foster a deeper understanding of the unique challenges faced by this population. Their expertise allows for tailored presentations that address specific topics relevant to your organization, such as the economic barriers ALICE families encounter, workforce trends, and effective community support strategies.

By exploring data on financial instability, housing affordability, and employment practices, these discussions can inform your policies and Initiatives, ultimately enhancing your organization's impact. Engaging with a knowledgeable speaker can also inspire meaningful dialogue among your team, promoting a culture of empathy and collaboration while equipping you with actionable strategies to support ALICE families in your community better.

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[unitedwayswla.org/marketing](http://unitedwayswla.org/marketing)



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# ALICE Survey SWLA

United Way Southwest Louisiana is conducting an ALICE Survey to gain valuable insights into the challenges faced by our community's Asset Limited, Income Constrained, Employed (ALICE) population. This survey collects comprehensive data on the economic realities, needs, and experiences of these hardworking individuals who struggle to make ends meet. By understanding their circumstances, we can better advocate for effective solutions and resources that empower them toward financial stability. The insights gathered will help shape Initiatives and drive community-wide efforts to create a brighter future for everyone in Southwest Louisiana.

Everyone's voice matters—this survey is a vital step toward fostering meaningful change in our region.

## Quote from the United Way Southwest Louisiana Survey of ALICE Families

“Once we pay a home loan, one car payment, and pay for insurances we are almost maxed out. The cost for food is difficult to bear. I work as a contract employee during the school year and during the summer we cannot qualify for assistance because we are considered well paid. We struggle to make ends meet, just like many of our peers. We rack up crazy amounts of debt just trying to get by. It is a heavy burden.”

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# ALICE Survey SWLA

42%

Only have a high school diploma.

41%

Have some college, but never finished a degree.

48%

Are renters and a majority feel like they are **RENT-BURDENED**.

45%

When asked what help is most difficult to reach the largest percent was for **DENTAL CARE**.

72%

Asked that community leaders address **HOUSING ASSISTANCE**.

63%

Feel somewhat connected to their community. **29% DO NOT FEEL CONNECTED** at all.

33%

Would like **JOB SPECIFIC TRAINING** to help them succeed.

## Lake Charles Memorial Health System

*Serving the healthcare needs of southwest Louisiana.*



Lake Charles Memorial Health System

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### Memorial Hospital

Southwest Louisiana's largest and only full-service community hospital.



### Memorial Hospital for Women

The region's only dedicated women's hospital and home of the OB Care Clinic where the focus is care, not cost.



### Archer Institute

Behavioral health hospital for adolescents and adults.



### Moss Memorial Health Clinic

Providing vital healthcare services for the uninsured and underserved populations.

# ALICE Toolkits

To download the PDF version of the ALICE Toolkits, simply scan the QR code below. If you prefer a printed copy, please contact United Way Southwest Louisiana for assistance!



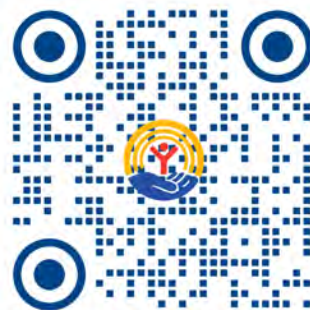
## ALICE Toolkit for Individuals and Families

The ALICE Toolkits for Individuals and Families are designed to empower those struggling to achieve financial stability. By providing accessible resources, practical advice, and valuable information, these toolkits help individuals and families better understand their financial situation and develop actionable plans. Participants will learn about budgeting, managing expenses, and maximizing available community resources to foster resilience and promote long-term economic success.



## ALICE Toolkit for Policymakers

The Advocacy Toolkits are crafted explicitly for community leaders, policymakers, and advocates who aim to improve the conditions for ALICE populations. These toolkits highlight the critical issues impacting ALICE families and equip advocates with the knowledge and strategies necessary to effect change. By promoting collaboration and offering insight into effective advocacy techniques, participants will learn how to mobilize their communities, influence policy decisions, and create sustainable solutions that support those in need.



## ALICE Toolkit for Employers

Employers play a crucial role in supporting the financial well-being of their employees, particularly those who belong to the ALICE demographic. The Employer Toolkits guide innovative workplace practices that can enhance employee engagement, retention, and productivity. These resources include strategies for providing financial education, creating supportive work environments, and developing benefits that address the unique challenges ALICE workers face. Employers can contribute significantly to fostering a more equitable and thriving workforce by investing in their employees' financial health.



# Notes

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To quickly find us on all our social platforms, simply scan the QR code. We appreciate your support and look forward to connecting with you!

*Thank you for being a part of our mission!*