

Updates

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A Quarterly Newsletter for the United Way Retirees Association

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A LOOK AT UWRA'S NEW LEADER

By Dan MacDonald, Oro Valley, AZ
Immediate Past President, UWRA



Tom Vais

If asked to list some of the formative experiences you would desire of a good CEO in our field what would you include? Teaching at an Arthur Murray's studio? It's great preparation for the moves one makes. Working in a brewery? It can inspire temperance, moderation for all the meetings one attends. Toiling in a cement factory? No comment.

UWRA's new president, Tom Vais, brings such background and a great deal

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Join the United Way
Retiree's Association!
For more information, contact Anne
Hunt at United Way Retirees
Association at (800) 892-2757, x621

As I see It

By Tom Vais, Monte Sereno, CA
President, UWRA

In 1994, I received a call from Chuck Devine, our retired friend from Seattle. He asked if I would be willing to serve on the UWRA board for a three year term. It's hard for me to say no to Chuck, so I agreed. I attended my first board meeting held in Cleveland, the location of the Staff Leaders Conference of UWA at that time. Bill Kerrigan was the chair of the board back then. When Bill reported that we were not getting anywhere with our fund raising, I suggested that we begin a letter campaign among local United Ways. Guess who was asked to take on the job? That year we raised \$35,000, a small but important beginning.

Here we are five years later, and I find myself taking over the helm of UWRA. I didn't expect that I would be building agendas, writing letters, making dozens of phone calls, and working on budgets. It's *deja vu* time. But I am looking forward to it, mainly because of the mission and purpose of UWRA, and the great people on the board and committees who will be carrying a lot of the load. I am also heartened with our growing membership. We have over six hundred retirees on our membership roster and we hope to build that to one thousand during the next term.

Before getting into details of my hopes and dreams for UWRA, I want to ask that you all join me in saying thanks to Dan MacDonald. He held the presidency for the past two years, put together our first work plan which helped to increase membership and began the development of our programs. Most important, he guided our effort to seek funding from United Way of America, which now allows us to hire our first executive direc-

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High Tech, High Touch — UWRA and the World Wide Web

By Anthony R. Folcarelli, Roseville, CA
Past President, United Way of California
Chair, UWRA WEB site committee

There's a great deal of action taking place in the United Way Retiree's group these days.

The momentum has been building over the last several years as former staff, using their organizational and people skills, have been building a viable organization for the future.

The new work plan developed under the leadership of past president **Dan McDonald**, retired CPO, Indianapolis, living in Oro Valley, AZ, and present president **Tom Vais**, former CPO in Santa Clara, CA, living in Monte Sereno, CA, reaches out to utilize the talents and expertise of the organization's members to bring value to the United Way system as well as the local communities it serves.

One of the major action items is the creation and development of a WEB site. Already in place the site will provide communication among the retirees and local United Ways that they never could have dreamed of during the days of their careers. In fact, one of the main reasons that UWRA is becoming such a vibrant organization is because of the technology advancements that are now available which allow constant and almost instantaneous communications at a relatively very low cost. Gone are the days of agendas, goals, and workplans typed on IBM Selectrics; mailing the same to a distant city, and attaining input and consensus usually through the necessity of costly face-to-face meetings. E-mail and faxes have changed all of that and, with the addition of the WEB site, UWRA can now play a vital role in the future of the United Way movement.

The WEB site will provide not only value to the retirees but to local United Ways who wish to take advantage of the proven successful expertise of many professionals who've been there and done it. This will position the whole movement ahead of a trend that is gaining momentum throughout the country: utilizing the

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MINUTES 1999 UWRA BOARD MEETING Friday, October 15, Alexandria, VA

The 1999 Fall United Way Retirees Association Board Meeting was held on October 15 at United Way of America Headquarters in Alexandria, Virginia.

Board Members in Attendance: Eugene Berres, Janet Bezdikian, Alan Cooper, Bobbie Creque, Joan Dixon, Dick Fusco, Elizabeth Gower, Dale Gray, Winifred Helton, Bernie Hyman, Tom Laing, Allen Larsen, Joyce Lew, Myron Liner, Dan MacDonald, Ruth Maldonado, Frank Marzolf, John McCormick, Bill McQueen, Sunshine Overkamp, Dell Raudelunas, Art Redding, Don Sanders, Bill Underwood, Ray Unk, Tom Vais, Stan Wakeham, and George Wilkinson

UWA and Other Guests: Bob Ivory, Advisor to UWRA; Jim Beale, Director of Crisis Response; UWA Counsel, Patti Gonsalves and Lyanne Wassermann, newly appointed UWRA Executive Director.

Dan MacDonald, President, presided along with the President-Elect, Tom Vais. At the evening dinner meeting on Thursday night, October 14, **Joyce Lew** and **George Wilkinson**, our newest Board members, attending a meeting for the first time, were introduced. Also, the Board voted unanimously to accept **Lyanne Wassermann's** appointment as the new executive director of the United Way Retirees Association. She was formerly introduced to the board at the beginning of the Friday meeting on October 15.

Minutes of April 16, 1999 Board Meeting: The Minutes of the April 16th board meeting were approved. Reports from officers and committee chairs followed:

Resource Development, Membership, Finance, and Office Operations:

1. Resource Development: **Gene Berres**, Chairman, advised that twelve new United Ways have contributed, including the United Way in Boston, for the first time. Thus far, United Ways have contributed \$25,785 this year (1999-00) with 73 United Ways responding. Berres advised that it was important to push fund raising support with the National Professional Council. Dick Fusco stated that it was an important strategy that local United Ways reconnect with their retirees.

2. Membership:

a. Membership Renewals: **Ray Unk** reported that we now have 602 members. Of that number, 102 are carry-overs from 1998 and have not renewed to date. At the last staff conference, the "30 year staffers" were given free memberships in UWRA for one year. Only six have renewed their membership to date. With this report Ray indicated that he had completed his work and that **Bernie Hyman** was taking over as the new chair.

b. Membership Development: **Myron Liner** advised that of the 602 members (102 carryovers at this time), there were 133 new members, 41 memberships were paid for by St Louis. He also pointed out that UWA has included an item on their recent salary study asking for information about recent local United Way retirees. The regional office of Mutual of America for Michigan and Indiana is compiling a list of still active staff over age 50 on their rolls, and are pursuing this information from their other regional offices.

Some ideas: **Bill McQueen** suggested that we make an effort to cultivate the Human Resources Departments in local United Ways for names and addresses of retirees on a regular basis. **Bobbie Creque** suggested we make a special offer to the Labor folks to join. It was also suggested that we do special mailings to the "50 Plus Staffers" encouraging them to join. **Dan MacDonald** also suggested that we supplement the membership fee for low income retirees in special cases.

3. Finance - Frank Marzolf reported that the retirees association raised \$80,000 during the last campaign and our expenses were \$64,000. We have a reserve of \$98,440, a major portion of which will be used to initiate the "Work Plan". Due to the large reserve and the need to align our fiscal year with United Way of America, Marzolf suggested that UWRA change its fiscal year from a July to June year to a calendar year. He stated this would fit better into the United Way of America fiscal year since our money is managed through this department-

Frank Marzolf moved to change our fiscal year to a calendar year beginning January

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FORGET TO
PAY YOUR
1999 UWRA
DUES?

It's OK, but a
reminder—

Your member-
ship will expire
on December
31, '99.

So, write a
check today.

Progress Report¹, 1997-1999

By Dan MacDonald, Oro Valley, AZ
Immediate Past President, UWRA

To begin, there isn't enough space here to adequately express appreciation of the work done by so many members of the association. I fear leaving out one or several who have been crucial to our progress. Being afflicted with "senior moments" comes more frequently so I'll say my thanks to most UWRA leaders individually. But there are a few people we couldn't have done without in the past two years...

Betty Beene gave us her blessing and encouragement to be entrepreneurial. **Chris Amundsen** stimulated us with the financial challenge. **Ike Fields** and **Bob Ivory** were our UWA liaisons and Bob carried an enormous load for us, most of which will be picked up by our new executive. **Lee Murray** helped us a great deal in human resources matters. **Dick Aft** of Cincinnati ably chaired the Joint Task Force which deliberated our proposal to UWA and moved the process to a good conclusion. Others from UWA who were in our corner included **Alice Thacker**, **Trish Moxie**, **Debbie Foster**, **Patti Gonsalves** and **Susan Padgett**. There were others who were behind the scene but I don't know all of them. And as the last issue of UPDATES told the story, our office and its fast-growing workload were held together by board secretary Joan Dixon and office secretary Anne Hunt.

The following capsules contain most but not all activities of the retiree association for the past two years:

- Membership on October 13, 1997 was reported at 347. At this time this year the number is 602.

- Membership eligibility was revised to admit current United Way employees who are 50 years of age or older and have 10 years of service in the field.

- Consideration is being given to an Associate Member category for those who have a long term relationship with United Way (e.g., loaned executives) or have a special interest in participating in UWRA programs.

- Financial support of UWRA has

¹This report is made at the request of Bill Tracy, UPDATES editor.

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Should We Change Our Name?

Myron L. Liner, Chair
Membership Development

Should we change the name of our organization? That question has been raised at the last several meetings of the Board. We need your help to deal with this matter.

Recently, UWRA expanded its focus to include both membership and programming for currently active United Way staff over age fifty and with ten years or more in the field. This was done because, as retirees, we understand now even better than before the need to begin preparations for retirement long in advance. We felt that we could be of service to those still working by developing programs for active staff that would help them to learn the things some of us had to learn the hard way. In addition, we knew

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Detroit Improves Retiree Pensions

By Myron L. Liner, Farmington Hills, MI
Chair, Membership Development

United Way Community Services in Detroit improved pensions for its retirees effective January 1, 1999. UWCS maintains a community pension plan that covers more than 30 member agencies. The pension improvement affected approximately 340 retirees of whom 30 were former United Way employees.

Retiree pensions were increased 1.5% for each year of retirement between 1983 and 1997 with a maximum increase of 22.5%. The average increase was \$50 per month.

This is the second pension increase put into place by Virgil Carr, Detroit CPO. He was also involved in increasing retiree pensions in Chicago before coming to Detroit.

Many retirees wrote to UWCS to express their appreciation after they were informed of the increase. For them it was a real Christmas present.

The revised pension plan also improved certain pre-retirement survivor death benefits for beneficiaries of employees who die prior to retirement. ☐

Donald C. Sanders,

Charlotte, NC
President-elect, UWRA

“When I graduated from the School of Social Work, University of North Carolina, in the late 50s, I was young, enthusiastic and filled with the intent to ‘reform the system’ (even though I didn’t yet know what the ‘system’ was). I did feel that we had not done for people what their needs cried out for.

“I chose the United Fund because it seemed to be devoted to orderliness, was sweeping in its apparent inclusiveness and because I was asked by a graduate of my school (it was Jim Dinsmore, UWRA member, now retired in Lago Vista, TX) and encouraged by my teacher and friend, Dr. Floyd Hunter, to engage with community leadership somewhere in developing a response to a bevy of big problems.

“So I joined a one man professional shop in the small town of Aiken, SC. My secretary knew far more than I did about the United Fund and helped me learn and start to grow in the trade. I stayed there for two years and learned the rudiments of running a small organization and the beginnings of how to relate to a diverse community of leadership and needful people.

“I also learned early that I needed help to progress and that I needed to be in a larger shop with a strong and visionary leader to take the next steps in my career. I sought and was ultimately selected to join United Community Services of Charlotte and Mecklenburg, NC.

“Gordon Berg hired me and ultimately helped frame me into a professional. Certainly he remains the big influence in my professional life. He was and remains a mentor and a friend. (He was also one of the early creators and guiding lights of the Retiree Association. Gordon’s intelligence and imagination is a mainstay in the field and one of those most regarded by our colleagues.

“I remained in Charlotte for the remainder of my career - 34 years from 1960 through 1994 - eventually becoming first executive director and later president of what became the United Way of Central Carolinas, encompassing three counties in North Carolina. Charlotte sits very near the South Carolina border. The name for the organization was chosen to



permit later expansion to a wide area, which represents the true regional character of our town.

“Charlotte remains the headquarters of UWCC. It is the largest city in both states and has experienced 25% population growth in the last five years. Throughout my years in Charlotte I remained at heart and in fact a social worker. I put greatest emphasis on service development among agencies in the non-profit and government sector and within the United Way itself when appropriate.

“UWCC also maintained one of the highest per capita giving to a United Way throughout the country through most of those years. Our relations with local government is a source of personal pride. We worked together well, even when we took steps to move into areas that filled voids and brushed hard against the public sector. We did pioneering work in the field of AIDS in partnership with the community foundation and developed a regional consortium on HIV that is copied by others. We developed strong internal information and referral services and a strong non-profit financial aid agency that is among the very few to receive and spend local government dollars as part of its recognized mission. The latter came out of a one stop center that the United Way set up to help people more quickly receive unemployment compensation during the recession of 1975. We added a strong volunteer center and other capacity building elements within the United Way.

“I’ve been active with UWRA since retirement and have enjoyed helping it become a viable organization.. It is a natural and needed aspect of United Way itself. There are two dimensions to our

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Additional 1999 Leadership Contributors to UWRA

\$250 or more	\$100-249
Al Cooper	Bill Bent
Chuck Devine	Jack Brooks
Ruthanne Robinson	Richard Clawson
Russy	Thomas Doran
Sumariwalla	John Garber
	Calvin Green
	Donna Johnson
	Merritt Johnson
	Tom Nunan
	Bill Kerrigan
	Rita Robertson

New UWRA Members

A.R. Aros	Tucson, AZ
Sandra Brooks	Lynchburg, VA
R. Thomas Cahill	Dayton, OH
John Carey	Chesterfield, MI
Virgil Carr	Farmington Hills, MI
Carrie P. Clark	Memphis, TN
Thomas Doran	Tucson, AZ
Art Emig	Jalisco, Mexico
Jan Ferguson	Tucson, AZ
Pat A. Fordyce	Trenton, NJ
Jill Gaynor	Tucson, AZ
Dorothea Heiden	Alexandria, VA
Carole B. Hill	Peoria, IL
Joy Holt	Tucson, AZ
Lois Jandernoa	Grand Rapids, MI
Edward F. John	Alexandria, VA
Kathryn John	Tucson, AZ
Irv Katz	Alexandria, VA
Kathy Long	Tucson, AZ
Elaine Merriman	E. Lansing, MI
Edmund Parker	Tucson, AZ
Glenn Richter	Perrysburg, OH
Ruthanne Robinson	Meridan, CT
Martin Scherr	Washington, DC
George Temple	Hampden, ME
Gary Thompson	San Jose, CA

Eugene B. Berres,

Lake Wylie, SC

Vice President, UWRA, Resource Development



Gene retired in 1992 from United Way of South Hampton Roads (VA) where he served as chief professional officer for 22 years.

His career covered 37 years with local United Way organizations serving Madison, WI, Green Bay, WI, South Bend, IN, Columbia, SC and the Norfolk-Virginia Beach area which included five cities.

Gene was born and raised in Kenosha, WI and, as he says, "From the time I was nine years old, the Kenosha Youth Organization was my second home. It was a YMCA type agency and a

Community Chest member, both organizations housed in the same building. Ted Meyer was the executive of the Community Chest and I got to know him and learn about his job, his career and his commitment to community service.

"I would say the desire to serve as a United Way professional came from my contact with Ted, 10 to 12 years of YMCA involvement, my parents guidance and example and my interest in people and community affairs."

Gene graduated from the University of Wisconsin with a BS in 1952 and received his MSSW from Wisconsin in 1956.

He was asked to tell about those accomplishments over the years that stand out in his mind. Gene responded: "Raising more than \$200 million was not the most important part of my work, but that's what I was paid to do. I was always more interested in what happened with the money.

"My most rewarding accomplishment was raising \$18 million for twenty new or renovated agency buildings. The United Way arranged for \$40 million in construction loans and stayed with each project until it was successfully completed. I think of each of those buildings as a "footprint", a legacy that stands long after the money raising experience is forgotten."

Gene continues: "In the years just before I retired, Donors Choice became a big issue. The Combined Federal Campaign began to give donors opportunities to designate any 501(C) 3 organization. In Norfolk, VA the future of United Way agencies, in competition with every other 501(C)3 organization in America, became a losing battle. We decided to face the issue head-on and compete for designations with a well-developed game plan, including marketing the United Way, as the best way to help the most people, getting donors personally involved, extensive thank you programs, quarterly newsletters, getting home addresses of employees on payroll giving plans, days of caring and leadership giving programs.

"We redesigned the pledge form and made agency and fields of service designations the center piece of our marketing. Norfolk became the pioneer in Donor Choice. It was risky but it worked. If it hadn't – well, as some of my friends said, "You're a short-timer, about to retire. What can you lose? Go for it!" The rest is history. But Donor Choice is still an issue for some local United Ways."

Gene was also asked who were his mentors, who among the field's professionals did he look up to? His reply: "The people I have known, both volunteer and professional are the most memorable part of my career. Volunteers taught me a lot about working with people. I am thankful for my volunteers and all the staff people I have worked with during my 37 years in the United Way business for making it a successful and enjoyable experience.

"My professional mentors were the real United Way missionaries who laid the foun-

Do You Feel Old Yet?

Culled from the Internet by H. Allen Larssen, Pflugerville, TX

Each year the staff at Beloit College in Wisconsin puts together a list to try to give the faculty a sense of the mindset of that year's incoming freshmen. Here is this year's list:

1. The people who are starting college this fall across the nation were born in 1980.
2. They have no meaningful recollection of the Reagan Era and did not know he had ever been shot.
3. They were prepubescent when the Persian Gulf War was waged.
4. Black Monday 1987 is as significant to them as the Great Depression.
5. There has been only one Pope. They can only really remember one president.
6. They were only 11 when the Soviet Union broke apart and do not remember the Cold War.
7. They have never feared a nuclear war. "The Day After" is a pill to them, not a movie.
8. They are too young to remember the space shuttle blowing up.
9. Tianamen Square means nothing to them.
10. Their lifetime has always included AIDS.
11. Bottle caps have always been screw off and plastic.
12. Atari pre-dates them, as do vinyl albums.
13. The expression "you sound like a broken record" means nothing to them.
14. They have never owned a record player.
15. They have likely never played Pac Man and have never heard of Pong.
16. Star Wars looks very fake to them, and the special effects are pathetic.
17. There used to be beige ones?
18. They may have heard of an 8 track, but probably never have actually seen or heard one.

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George Wilkinson

*Reno NV,
Vice President UWRA, Resource Development*

Dr. George Wilkinson held senior management positions with United Way of America, the nation's largest charitable organization, from 1980 to 1991. He was responsible for developing the model, training materials, and consulting to institute strategic planning within the United Way system. He was also responsible for developing UWA's nationally acclaimed environmental scanning process and reports. In addition he directed UWA's National Academy for Voluntarism, Research Division, Market Management Group, and its Management and Community Studies Institute.



Prior to United Way of America, Dr. Wilkinson was the associate executive director for the United Way of Eastern Fairfield County, Bridgeport, CT. Here he developed and directed numerous public/private partnerships in the fields of criminal justice, home health care, day care and refugee resettlement. His work pioneering strategic planning in the United Way system led to his joining United Way of America.

Over the past 45 years, Dr. Wilkinson has had several careers in addition to United Way. Holder of three degrees including a doctorate in educational administration, he has served as president of a major school district's board of trustees, teacher and lecturer at the university level and as an administrator of a major Fortune 500 company's center for early childhood education.

George Wilkinson remembers, "I got into the UW field by accident. I had been hired to do a consulting job by a consortium that included the local UW in Bridgeport, CT. When that was done and my report called for a special project, I was hired to run the project (on child care). The only member of the consortium that had office space available was the United Way. A year later I was offered the job of associate executive director for planning, research and allocations and my UW career was launched.

"As I look back on my UW career, I would say that my greatest contribution to the movement was the work I did at UWA developing strategic management materials, helping to install the strategic management in process in local UWs, and my work staffing the national strategic planning committee.


"While I'm new to participation in UWRA I hope to help it explore and build those services to its members and the UW field. I don't think it will be easy for a small association to do, but our challenge is to find those services that the Association might uniquely provide, thus avoiding services provided by UWA and by larger associations (like AARP), to which many of our UWRA members also belong."

Dr. Wilkinson is founder and chairman of The Wilkinson Group, a publishing, research, training and consulting venture specializing in providing strategic services to health, educational and human service organizations of the nonprofit sector.

The major products/services of The Wilkinson Group are: its monthly newsletter, *Happenings*, which reports on trends and events that affect the human condition; facilitation of retreats for boards and staff; design and facilitation of strategic planning processes; community needs assessments; organizational assessments, and presentations of the nature of change in America.

Dr. Wilkinson began his work experience in his home town of Las Vegas, NV as owner and manager of several printing, publishing and public relations firms.

He is the author of numerous articles, publications and book chapters on identifying change through environmental scanning and management of change in the nonprofit sector.

He is a keynote speaker for the American Marketing Association and a professional member of The World Future Society, The Strategic Leadership Forum, and the Strategic Planning Society. 

It's Not My World Anymore

By Michael Spear, Kokomo, IN

During the past three or four decades, I have spent a good deal of time thinking about retirement and old age. How much money will be needed? How long will I live? What will getting older be like in terms of health, happiness and life in general? There were many questions and not many answers so I began asking people older than me what they knew. Here are some of the observations and answers I was given.

Time

As you get older time speeds up. I can remember being in grade school and an hour lasting a week and a week a month and a year was a lifetime. Now, a year is some where between a week and a month in length compared to my time line as a child. Since time seems to be relative to how old you are and speeds up geometrically, it means the rest of my life will go by very quickly.

One of the other questions I had was: Does time slow when you retire? My suspicion was it did because you had more time to do as you wanted and the pace of life was less hectic. Evidently I was wrong. Every one I've asked about this who is retired has indicated retirement has nothing to do with the speed of time. It is only relative to age and, since we continue to age even in retirement, time goes by faster and faster. The result is the senior years last the least amount of time, not in years necessarily, but in terms of length of time as we experience it.

The Naturalness Of Aging

Somewhere along the line of life, I began working to understand the aging process and our life's work. It was the struggle with letting go that caused me to look at this so hard. I have worked since the age of 10 bailing hay, scooping manure and shelling corn on the farm. Since work was my life for the past 40+ years and, because by the age of 50 I found myself getting tired of fighting with the way the world was going, I began questioning how much longer I would work and why it seemed, every time I turned around, change was making my world less comfortable for me. It was really confusing for several years but I think I've finally figured it out. (Boy is

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UWRA Southeast Conference, 1999

By George Pfeiffer, Weaverville, NC Conference Chair

Photos by Sally B. Mandel, Savannah, GA



Bernie & Pat Hyman

Some 30 retirees and their spouses assembled September 27 to 29 at the Wildacres Conference Center in North Carolina. Hurricane Floyd had caused some cancellations, but those who attended had a great – albeit soggy - time!

Dr. George Yates, professor of International Management at the University of North Carolina at Asheville, updated us on American-Chinese relations and shared with us some information that suggests that besides having a huge population (1.25 billion people), China's economic and military resources are quite limited.

Bob Ivory of UWA spent a half-day with the group. He updated us on various strategic directions of the United Way system, e.g., branding (the logo will soon be "refreshed"), fund raising trends and strategies, outcomes and accountabilities, United Way Information Network (UWIN) and its competitive forces, etc.

The lousy weather prevented golf or the enjoyment of the area's scenic beauty. So-o-o, "bonding" became the principal activity. There was considerable discussion regarding the location and agenda of future Southeast Retirees Conferences and Bob Walther agreed to initiate some useful planning for this purpose. Bob's phone number is 615-896-7056. He would welcome your ideas.

Those attending were:



Bob Ivory



Elizabeth Gower



G. Pfeiffer & G. Yates



Dick Clawson



Joe Medlin



Doris Moore



Wanda Phibbs



Dwyer Sump



Charles Fleming



Gene Berres

- Peter & Janise Auerbach
- Charles & Edna Ruth Fleming
- Doris Moore
- Rodney & Wanda Phibbs
- Gene & Lois Berres
- Tom & Elizabeth Gower
- Bob & Sylvia Noble
- Bill Putman
- Dick & Angeline Clawson
- Frances Hine
- Marcia Parker
- Don & Mary Sanders
- Wayne and Betty Davis
- George & Brenda Pfeiffer
- Bernie & Pat Hyman
- Jean & Nelda Savoy
- Bob Ivory
- Dwyer Sump
- Jan Macidull (Obeid)
- Bob & Lois Walther
- Sally Mandel
- Joe Medlin

Hey!
You're Happy!



That means you sent
a check for your
1999 dues to UWRA!

The Surgeon and the Mechanic

From H. Allen Larsen, Pflugerville, TX, culled from the internet.

Morris was removing some engine valves from a car on the lift when he spotted the famous heart surgeon, Dr. Michael DeBakey, standing off to the side, waiting for the service manager.

Morris, who was somewhat of a loud mouth, shouted across the garage, "Hey DeBakey...Is dat you? Come over here a minute."

The famous surgeon, a bit surprised, walked over to where Morris was working on the car. Morris, in a loud voice that all could hear, said argumentatively, "So, Mr. fancy doctor, look at this work. I also take valves out, grind 'em, put in new parts, and when I finish this baby will purr like a kitten. So how come you get the big bucks, when you and me are doing basically the same work?"

DeBakey, very embarrassed, shook his head and replied in a soft voice, "Try doing your work with the engine running." ☒

IN MEMORIAM¹

“To find the best in others; to leave the world a little better, whether by a healthy child, a garden patch, a redeemed social condition; to know even one life has breathed easier because you have lived. This is the meaning of success.”

Ralph Waldo Emerson

Donald F. Andrus

1938-1998
Retired Executive Director
United Way of
Natrona County, Inc.
Casper, Wyoming

Nancy Saling Ferreira

1940-1998
Executive Director
Yuba Sutter United Way
Marysville, California

Joseph E. Fisher

1929-1998
Retired General Chairman
Nationwide Insurance Enterprise,
Member, Board Of Governors,
United Way of America

Lyman S. Ford

1909-1998
Third National Executive Director,
United Community Funds and
Councils, the precursor to United
Way of America

Warren B. Goodwin

1915-1998 Retired President
Texas United Community Services
the precursor to The United Way
of Texas

William Kaufman

1910-1998
Retired Executive Director
United Way of
Southwest Alabama,
Mobile, Alabama

Lyndon R. Milliken

1920-1998
Retired Chief
Professional Officer,
Lake Area United Way,
Griffith, Indiana

Charles Morrow

1955-1998
Campaign Chair
United Way of the
Chattahoochee Valley
Columbus, Georgia

Richard W. Royds

1938-1998
Senior Partner, Bracewell and
Patterson Houston, Texas Member,
Board of Governors, and Chair,
Diversity Committee, United Way
of America.

Judith McN. Solomon

1958-1998
Director of Finance and
Administration,
United Way of
Chattahoochee Valley,
Columbus, Georgia

Henry T. P. Weber

1911-1998
Associate Executive
United Community
Funds and Councils, the precursor
to United Way of America

Harold L. Weekley

1913-1998
Retired Executive
Director, United Way
Chattanooga, Tennessee

Barbara Carney Williams

1935-1998
Chief Volunteer Officer
United Way of Kanawha Valley,
Inc., Charleston, West Virginia

¹IN MEMORIAM is reprinted from the United Way of America annual report.

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*Appointed

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President Elect	Donald G. Sanders
Vice President – Programs	George Wilkinson
Vice President – Resource Development	Eugene B. Berres
Secretary	Joan Dixon
Treasurer	Frank Marzolf

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Newsletter Editor	William C. Tracy
Membership Development	Myron Liner
Leadership Giving	John Garber
Membership Renewal	Bernie Hyman
Local United Way Campaign	Dick Clawson
Volunteer Recruitment Project	Donald Morgan

HONORARY MEMBER: Gordon J. H. Berg, Founder

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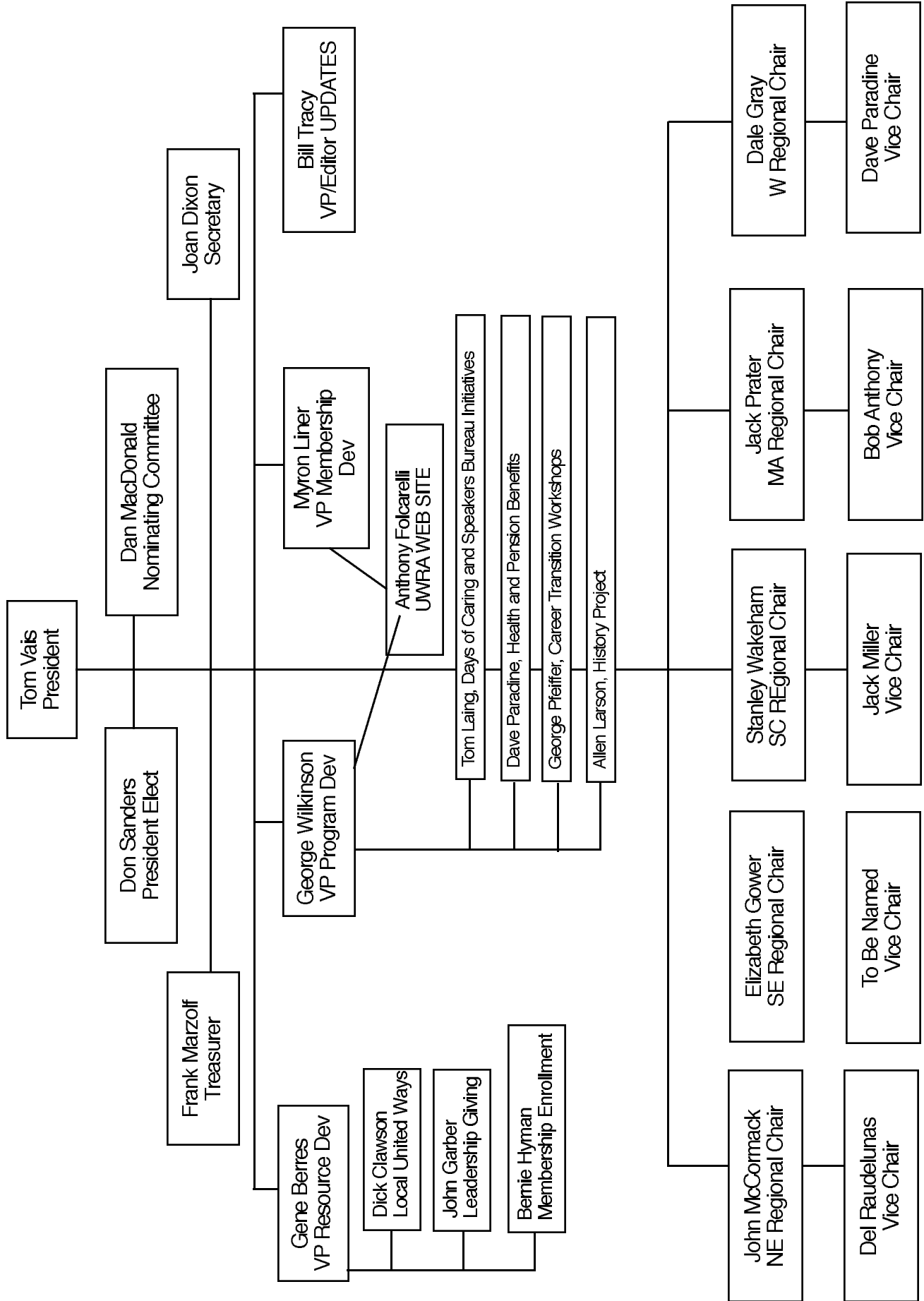
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UWRA ORGANIZATIONAL CHART



UWRA-Local United Way Membership Drive Report

*By Dick Clawson, Spring Hill, FL,
Vice Chair, SE Region
Chair, Local United Way Membership*

Letters requesting continuing support of 140 current members and all Metro I-V non-members were mailed in mid-August.

The returns so far have been great with 12 new members and 61 previous members contributing \$25,785, 46.8% of our \$55,000 goal. These contributions represent approximately a 20% increase over last year's level of support for the same United Ways.

New members to date are:

Boston, MA	Lawrence, MA
Clarksville, TN	LaGrange, GA
Danville, VA	Menasha, WI
Fredericksburg, VA	Montgomery, AL
Gadsden, AL	Port Richey, FL
Greenville, SC	Springfield, MA

Our next efforts will concentrate on having previous members submit their pledge cards, exceed our goal and earn some "Challenge Grant" money from United Way of America (for dollars raised exceeding the goal). ☑

Humor Health Facts

Submitted by Connie McCormick, R.N., Bethel Park, PA

Twenty seconds of laughter is the cardiovascular equivalent to three minutes of strenuous rowing.

Sustained laughter stimulates an increased release of endorphins which can diminish physical and psychological pain.

Sustained, frequent laughter can help some people to lower their blood pressure.

The biochemical and cardiovascular benefits of exercise are more pronounced when exercising in a relaxed, positive mood and are comparatively diminished when exercising in an angry or sad mood.

Using humor and laughter to keep things in perspective was one of the nine

continued on page 19

Reunion in Michigan



United Way of Oakland County (Pontiac, MI) 50th Annual Meeting and Golden Anniversary Celebration was the occasion for two former executive directors to get together with the current one. (From left) Rick David, current president, Tom Laing, retired president from 1978-1998, and Dale Gray, retired, executive director from 1973-1978.



Four issues planned for 2000.

UPDATES will be sent to the members 4 times next year.

But we do need you to tell us of your comings and goings, your thoughts on the articles in UPDATES, any comments you may have.

Of course, if you don't write to us we may only have two or three editions for 2000.

In order to keep to that schedule deadlines must be set. Listed below is the date by which each edition should be mailed. The second column lists the date by which copy should be received by UPDATES if the article or letter is to be in that edition.

In U.S. Mail to Members:

by January 31
by April 30
by July 31
by October 30

Copy to UPDATES:

by December 15
by March 15
by June 15
by September 15

Send letters, articles and pictures to Bill Tracy at:

U.S. Mail: 56 Dennett Street, Portsmouth, NH 03801-3600

Via E-Mail: gochess@mediaone.net

Via Fax: 603-431-6432

Telephone: 603-433-1969

And don't forget the pictures. But they must have full identification in order (left to right) and a full description of the event. The picture may be in color or black/white. ☑

A Look at UWRA's New Leader (continued from page 1)

more talent to his new office. Born and raised in Pittsburgh, possessing Greek heritage and traits, educated in business administration at Duquesne University, he cut his United Way teeth in three years as a campaign division director in Allegheny County (1960-63). Between college and his ultimate career path he worked in sales for Equitable Life Insurance (1956-60) where he made his best pitch by far. meeting, wooing and after nearly four years, marrying Miss Beverly Feitt also from Pittsburgh and a secretary at the company. From these humble beginnings in the East it was the West Coast for life for the Vaises.

Tom devoted thirty years to the field, retiring in 1991 after serving as president of United Way of Santa Clara County from 1976. His last campaign effort raised \$26 million for the support of 120 agencies and services. He led a staff of seventy people and worked closely with hundreds of volunteers in what became known as the prime center for high tech and computer industries - Silicon Valley. His United Way was one of the fastest growing in the country. Previously, he served as Campaign Director in Santa Clara from 1968-76 and as CPO of the West End United Way in Ontario, California from 1963-68.

Highly respected by his peers, Vais served a term as Chairman of the Western Regional Conference. He was also a member of the UWA National Professional Council, chairman of the national Communications Task Force, a member of a number of national staff conference program committees. He served on the Mutual of America's President's Council, an advisory group to the organization that provided insurance and benefit programs to non-profit agencies nationally. He is an emeritus member of Select Cities, a group of United Way executives devoted to assisting each other and the field. His post-graduate work included the Executive Management program at Harvard University and continuous participation in courses at the National Academy for Voluntarism.

Since his retirement, Tom has been an extremely active volunteer in his community, serving on boards, advisory groups and community programs. He is an unpaid consultant to a program which serves the brain-injured, helping to found

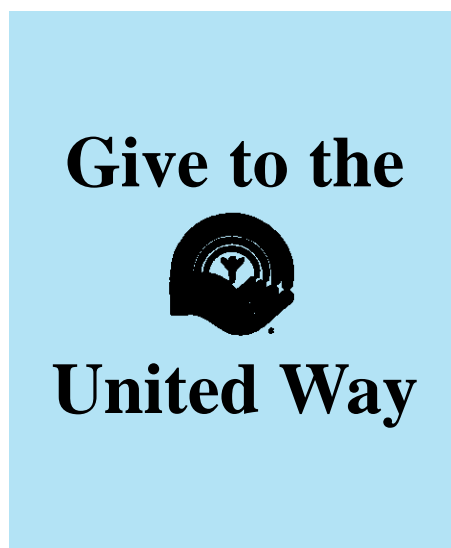
new ways to help those permanently damaged by accidents. He has been a consultant to the Joint Agencies Trust, a non-profit organization that provides cost-savings unemployment programs to over 1,400 agencies in 43 states.

When he has some rare moments to himself and the inclination, Tom will play a little golf. Otherwise he is a jack-of-all-trades around the house - repairing the roof, replacing gutters, doing yard and garden work.

Beverly is no less a doer than Tom. She has served as volunteer advocate for head-injured clients of all ages. She is active in Family Care Givers Alliance. A recent volunteer success was getting certain automobile dealers to support the brain-injury program by giving it a small percentage of the profits from the sale of new cars.

The Vais' have three children: Thomas S., 36; Bob, 34; and Diane, 33. All of them live within ten miles of the family. "A great blessing for us," says Bev. She utilizes her other talents - painting, decorating, wallpapering, both at her home and at those of the children. Of course she babysits the grandkids as does Grandpa from time to time.

For those who know Tom well, there is considerable confidence in knowing he will be at the helm of the retirees association. He has worked in lock-step with me, the outgoing-president, for two years. He has been privy to and part of every decision, every proposal, every advancement made. He is enthusiastic and hard working. UWRA is bound to prosper under his hand. ☐

*As I See It... (continued from page 1)*

tor of UWRA. Under Dan's leadership, we have made major progress. Thank you Dan. Now you can retire for the second time.

We have come a long way over the past five or six years. Great leadership from people like Don Morgan, Bill Kerrigan, Al Cooper and Dan have made it possible. We also have a first class line-up of chairs that I know will allow us to continue our growth. We have printed an organization chart on page 11. These leaders will be taking UWRA into the future. I invite you to join us to make good things happen for the movement, and for the retirees who belong to UWRA.

While we have had successes in fund raising and membership development has come along, our newsletter edited by Bill Tracy has helped to hold us together. It has been and continues to be our "glue". We publish the newsletter four times a year. I hope it has been of interest to you. We look to all of you for input, news contributions, particularly about our retirees. We want to know what is happening to them.

Over the next term, however, it is essential that we concentrate on two key areas, program and membership development. I have asked George Wilkinson to chair the program area. Myron Liner has agreed to continue as membership development chairman. In program, there are several areas that we need to focus on and with the employment of a first director on January 1st, I am hopeful we can begin to build the programs that can make a significant impact on the field and our membership. Programs for the field and for our retirees will help to raise more funds and, most important, will help to add additional retirees to our roster. As we strive toward building these efforts, I hope all of you will support our goals. We have a work plan that continues to build on the four goals established by the board several years ago. You are urged to write us, call or email us. Whatever your means of communications, **let us know your thoughts.** We look forward to hearing from you. ☐

High Tech, High Touch (continued from page 2)

talents of retirees, giving them the opportunity to continue contributing to society instead of spending their time in the old proverbial method of the rocking chair, the old porch and reading the daily newspaper.

The synergy has already begun with the support of the United Way of Southern Nevada which answered the appeal of the retiree group and provided their support and a staff person who is now the WEB master for the site: **Albert Weiss**. A great debt of gratitude goes out to him and UWSN.

The major goals and action steps as listed below give just a hint of the potential that is intrinsic in the **present and future** activities of the WEB site. Regional committee members **Stanley Wakeham** of the South Central Region and **Anthony Tommanio** of the Northeast Region have been very active in the formulation of the goals and action steps. They along with the expected appointees from two other regions will provide the communications links for this whole new venture into the technology era.

One of the most important objectives of the committee will be to educate retirees, who do not have personal access to the Internet, about public sites with computers. Many local libraries, for example, offer Internet stations and assistance to new comers from librarians on how to use the computer and gain access to the retiree's web site. This is also true for many local senior centers. Of course, it is hoped that local United Ways will also allow some free time for local retirees.

One of the valuable connections, already developing, with United Way of America and the UWRA WEB site will assist the field placement office to serve local United Ways as they request experienced temporary professional assistance.

United Way of America Retiree Association Web Site

Major Goal

To develop technological support through the establishment of a WEB Site that will:

- Facilitate in an efficient and economic manner, most of the other goals stated in the UWARA work plan;
- Establish communication between and among retirees providing and creating pertinent information exchange centers;
- Bring value to the United Way system by utilizing the proven expertise of retirees;
- Establish interactive lines of communication between retirees and local United Ways for the exchange of information.

Action Steps:

1. Design and maintain a United Way Retiree WEB Site.
2. Provide and update a current list of retiree members and their e-mail addresses.
3. Install linkages to other WEB sites relevant to the needs of retirees, e.g. Social Security Administration, Internal Revenue Service, AARP, etc.
4. Develop chat box outlets on subjects chosen by the retirees.
5. Insert articles of interest to retirees, especially those that will assist them in maintaining a decent quality of life.
6. Develop a mentoring procedure that will match and partner retirees and local United Way CPOs.
7. Establish a job bank that will provide local United Ways with a means of securing consulting services from those retirees interested in temporary work.
8. Create an information and problem-solving program that will enable local United Way organizations to obtain from retirees their opinions and possible solutions to particular problems.
9. Create and develop a membership center wherein the latest information will be provided on membership benefits, fees and different vehicles for enrollment including the web site.
10. Create and develop a UWRA operational center that will provide the current organizational status of officers, regional officers, and committee structure as well as the work plan and the upcoming meetings pertinent to the business of the organization. ☐

Change Our Name? (continued from page 3)

that there are many still working who would like to maintain contact with and keep abreast of friends who have retired. We are already developing and scheduling programs for this group.

Since the change in membership eligibility criteria we have found that there are many who are working who are concerned about being affiliated with "retirees." They do not think of themselves as retirees and do not want their colleagues to think that they are planning to retire soon. It was never our intent to expand membership only to those who plan to retire soon.

To the contrary, we want to reach those who have plenty of time to plan so that their plans can come to successful fruition in a timely fashion.

Many companies have organizations for retirees. Many of these organizations include non-retired employees. In looking at them we find that most do not use the word "retiree" in their name. For example, telephone retirees are "Pioneers." It seems that "retirement" is not only a status, it is also a frame of mind.

As a result of our recent experiences the question has arisen as to whether or not it might be beneficial for the United Way Retirees Association to change its name and, if so, to what. Possibly, in addition, perhaps we should establish a different status for our working colleagues. What do you think?

We are requesting that you let us know how you feel about these issues. The questions we would like to see addressed are:

- 1. Should the United Way Retirees Association change its name?**
- 2. If so, what name(s) would you suggest be considered?**
- 3. Should we adopt a different status for non-retired, as opposed to retired members? If so, can you suggest possible names for this category of membership?**

E-mail responses can be sent to Myron Liner at mliner661@aol.com. If you would like to discuss your feelings with me I can be reached at (248) 661-1195. Written comments are also welcome. Please send them to me in care of the United Way Retirees Association, 701 North Fairfax Street, Alexandria, VA 22314-2045.

We thank you for your help. ☐

Minutes, 1999 Board Meeting (continued from page 2)

1, to modify our cash system to an accrual system beginning January 1, and to use reserves to pay our expenses between July 1 and the end of year 2000. this motion was carried.

4. Office Operations/Secretary's Report - Joan Dixon reported on the activity since our last board meeting. First, the office was moved to larger quarters on the third floor at UWA, and it has taken considerable time to get everything set up, including the new office for our executive director. The other challenge is that UWA has changed computer systems from the AS 400 to the IMIS system. Consequently, some of the UWRA programs which were in place were not carried forward to the IMIS system. It was suggested that we look into purchasing our own software package and not depend entirely on United Way of America.

5. Editor's Report on "UPDATES": Since **Bill Tracy** was not able to attend this meeting, **Dan MacDonald** reported that a new issue is about ready to be printed. He is aiming for another one by February. Dan stressed getting information to Tracy on an on-going basis, especially for the "Who, What, When, Where" column. Bill was asked to put out four "UPDATES" this year, and of course, he is attempting to do this. A motion was passed to give special recognition and appreciation to Bill Tracy for his outstanding work on "UPDATES".

6. Don Sanders, Bob Ivory and Sunshine Overkamp reported on the pilot program for seminars on "Career/Life Transitions". **Cindy Gurne**, a consultant and former UWA employee, was contracted to put together a model program. Two pilot workshops were planned for 1999. One workshop was held in Wilmington, NC, and the other, planned for Atlanta, was cancelled. The review of this course was excellent and it was believed by those who participated that we have a good product, but it needs to be marketed to the field. Sunshine Overkamp agreed to develop a marketing plan for this program to be presented at staff and regional conferences. Bob Ivory stated that "Career and Life Transition" workshop is now listed in the NAV catalog as potential seminar, and that financial planning would be added to the list.

7. United Way History Project: Allen Larsen, Chair, advised that in response to several UWRA members, that the Retirees

Association work on a new history of the United Way movement. He had been in touch with **Nancy Mason** of UWA and **Anne Hunt** on the status of the United Way of America files from the archives and plans to contact **Henry Smith**, former UWA librarian and archivist, concerning the interview tapes he conducted. Larsen plans to pull together a panel to collect and compile information and to interview senior UWRA members. **Betty Beene** has endorsed a project by a doctoral student in Organizational Behavior at Case Western University, Elizabeth Essex, to write a dissertation on United Way history, and has asked for our cooperation if contacted.

Don Sanders moved, and it was seconded and passed, *to authorize the expenditure of up to \$3,000 for the United Way history project, to be used by the chair and panel as needed.*

8. United Way Conferences: Allen Larsen reported that there are two major UWA conferences next year. The United Way Staff Conference (SLC) will be held February 10-12, 2000 in Houston, Texas, and the United Way Community Leaders Conference (CLC) April 13-15 in Los Angeles. We have usually had a UWRA booth at these conferences to highlight the work of the United Way Retirees Association. Tom Vais advised that there will be a board meeting at the April 2000 Community Leaders Conference in Los Angeles on April 14, and we will have representation at the SLC. We need volunteers to staff the UWRA booth at both conferences. At the staff conference, we will join with United Way of America to recognize United Way staff with 30 years or more of service.

Janet Bezdikian, UWRA representative on the Community Leaders Conference Planning Committee, plans to attend the October 28 planning meeting. She will focus on marketing UWRA, especially in the CLC promotion literature, and emphasize our plans for an attractive booth. We need to think about some "giveaways" at the exhibit booth.

9. Lyman Ford Memorial Fund - Discussion followed on the use of the fund which now is at \$10,200. George Wilkinson stated that UWRA received a proposal from Ed John, UWA Planned Giving Program, to offer training to retirees interested in becoming involved in the program. Retirees could be trained on how to

make presentations and to dialog with people who would like to set up charitable distribution of their wealth. Ruth Maldonado stated that this is a fast growing effort among United Ways. Dan MacDonald emphasized that planned giving is a part of our Work Plan and that UWRA members are encouraged to utilize planned giving for their own giving. Wilkinson indicated that he would continue to review the proposal and will strive to establish such a program for UWRA.

10. Health Benefits and Pension Programs - Reporting for Dave Paradine, Dan MacDonald advised that Paradine is developing a position paper regarding pensions. He also stated that an insurance company in California was identified that deals with non-profit organizations, providing information on health benefits programs, drug prescriptions and long term care. He stated we could make this information available to our members.

11. National Corporate Leadership program: Dick Fusco stated that we still have seven or eight retirees working with NCL on their corporate research program involving scanning certain periodicals for information about the companies.

12. Member Activities Program: Stan Wakeham elaborated on the wonderful Alaskan cruise taken by some of our members in June. He described the beauty of Alaska and the side trips taken. Wakeham stated that other trips will be planned for next year, including some inexpensive excursions that should be interesting and enjoyable. He asked for suggestions from anyone who is interested.

13. Days of Caring and Speakers Bureau: Dan Macdonald expressed appreciation to **Tom Laing** for his tremendous efforts to develop these initiatives. Laing conducted a recent survey among United Ways regarding the Days of Caring and Speakers Bureau initiatives and received back 35 to 50 responses. His last effort was made to state organizations and feels this is a better way to promote these efforts. A list of potential speakers from UWRA members has been developed and they are available for assignment.

14. Program Suggestions: Joan Dixon proposed three program initiatives for consideration by the Board.

(1) Growth of the Organization and

continued on next page

Minutes, 1999 Board Meeting (continued from previous page)

Change of Name: With the increase in membership and the potential increase of those 50 years of age and with ten years of United Way service, Dixon pointed out that the name of the organization should better reflect this category of membership. Changing the name to United Way Staff and Retirees Association was proposed. After considerable discussion, it was determined that no action would be taken at this time until a report of the survey in UPDATES on this subject has been completed, and further consideration of a different name be considered.

(2) United Way Retirees Association Service Corps: The proposal to establish a UWRA Service Corps which would provide a source of talented people, drawing from soon to retire and retired people, who could take on temporary assignments with a LUWOs or STOs in need of help due to illness, resignation, or death of a key staff person, or for a special needs project was given serious consideration. Because of the complexity of this proposal, it was determined that George Wilkinson's committee on Program Development would undertake a study to ascertain if such a program was feasible.

(3) Proposal to establish a "Lifeline Fund" for emergency needs of URA members who live on low income pensions and have a one-time need for an emergency situation involving their home or health in an amount up to \$500. This proposal has many complications, including criteria, whether or not such a disbursement of funds would be allowed under a 501(c)(3) category (for which we are applying), and the involvement of the local United Way. It has been referred to the Program Development Committee for further determination.

REGIONAL REPORTS

South Central Region: Stan Wakeham reported that their regional conference will take place soon and that they expect a good turn out of retirees. He also reported that new contributions were received from several United Ways in the Region.

Mid America Region: In the absence of **Jack Prater**, it was reported that state chairs invited retirees to attend a variety of meetings, such as the Ohio and Indiana conference. Some United Ways in the region hold local retiree reunion events. These retirees are being contacted to see

if there is an interest in holding a regional meeting some time in the future. Tom Laing recruited Pat Hall to serve as the new Michigan state chair. Hall was director of services at the United Way of Michigan.

Western Region: Dale Gray reported on the UWRA Western Regional Meeting held at Lake Tahoe, which was very successful. The next meeting may be held in Arizona and plans are just being formed at this time.

Southeast Region: Elizabeth Cower reported on another successful Southeast Regional meeting at Wildacres Resort in the mountains of North Carolina. There were 38 people in attendance and George Pfeiffer planned a wonderful program for the meeting, mixed in with fun and recreation.

Northeast Region: John McCormick stated that the Northeast had a "Homecoming" program at the Northeast Regional Conference. Although only five retirees attended, it was a good start and they participated in the Newcomers/Retirees Reception attended by Betty Beene.

McCormick passed out a job description he developed for state chairs. Dan Macdonald suggested it be shared with other regions and that a "national" state chairs job description be developed.

UWA Director of Crisis Response: Jim Beale, Director, gave a presentation, regarding the North Carolina floods, of how UWA could be of assistance in rebuilding community services in the areas affected. Beale stated that he would like to obtain the support of the retirees association in dealing with local crises situations along with that of local United Ways and of state organizations. MacDonald suggested that Tom Vais, George Wilkinson and Don Sanders develop a plan on how the retirees association can become involved and help in future local crises working with Jim Beale.

REPORT ON UWA2000-2001: Bob Ivory reported on the 2000 Tactical Plan for United Way of America. It will revisit donor choice and marketing tools looking at Michael Tracy's dershup." With regard to competition to United Way fund raising, the "Federation of Charities" is an organization that needs to be watched. "Brand Initiative" will continue to be a main thrust of WA. Ivory reported on a number of ini-

tiatives that UWA is committed to, including the Harvard Program under Community Impact, the grant from the Casey Foundation, the Bank of America Grant for Success by Six, and the pilot program in ten communities concerning initiatives to decrease cancer; web site further development; pledging on line; and the challenges of working out the problems with UWIN. He stated there is lots of excitement in these programs. The new UWA Annual Report is out and he will see that board members get a copy-

Dan MacDonald expressed the appreciation of the UWRA board and members for the great support Bob Ivory has given to and work that he has done for the Retirees Association. Bob Ivory has been actively supporting the UWRA initiatives over the past two years and has been involved in working out details of UWA's involvement in the staffing of a new executive director for the organization and well as input in a number of programs, including the pilot "Career/Life Transitions" workshops.

UWRA WEB SITE: Tom Vais reported that **Tony Folcarelli** has been working as chair for the UWRA Web Site primarily with **Albert Weiss**, but has two working committee members, **Anthony Tornano** in the Northeast Region, and **Stan Wakeham** in the South Central Region, to build for the future. He has developed goals and action steps for the work plan (attached).

STATUS OF ESTABLISHMENT OF NEW UWRA CORPORATION: Patti Gonsalves, UWA Counsel, reported on the status of our "Articles of Incorporation" as a 501(c)(3) entity and application to the Internal Revenue Service, Tom Vais stated that the Articles of Incorporation and Bylaws set forth procedures and policies of the organization. These incorporation papers have been prepared and financial statements reviewed by the UWA financial officer. The "Articles" contain some oversight by UWA. Board members expressed some concern over this involvement by UWA. Tom said that the work program must be brought in line with 501(c)(3) requirements. After some discussion, **Don Sanders moved, it was seconded, to give board approval for the filing of the Articles of Incorporation. Motion passed.**

continued on next page

Minutes (continued from previous page)

JOINT TASK FORCE - STAFFING: The Joint Task Force completed its job in working out an agreement with UWA President, Betty Beene, concerning the staffing of UWRA and the joint financial arrangements over several years. A **motion was made to formally recognize Dick Aft** and to express our appreciation for his work regarding the Joint Task Force, and also appreciation for the support of Bob Ivory, Anne Hunt and Joan Dixon in this regard. Motion passed.

PROGRESS REPORT -1997-1999: At the request of **Bill Tracy**, UPDATES Editor, **Dan Macdonald** prepared a progress report for the past two years which illustrates the great strides made by the United Way Retirees Association. (Report is attached)

REPORT OF THE NOMINATING COMMITTEE: **Alan Cooper**, Chair, submitted a report on the recommendations of the Nominating Committee as follows:

1. That **George Wilkinson** be elected for a three-year term (class of 2002). He has agreed to serve as Vice President-Program in the Vais administration.
2. That the following members of the class of 1999 be re-elected for a 3 year term (class of 2002); **Ray Unk, Tom Vais, Sam Winston, Janet Bezdikian, Bobbie Creque, Ruth Maldonado.**
3. That the following be elected to serve a one-year term as officers of the Association:

Tom Vais, President

Don Sanders, President Elect

George Wilkinson, Vice President - Program

Gene Berres, Vice President - Resource Development

Joan Dixon, Secretary

Frank Marzolf, Treasurer

A motion was made and passed to accept the above report of the Nominating Committee.

REPORT OF THE NEW PRESIDENT - TOM VAIS

One of the first actions taken by the new President was to present to Dan MacDonald and Hanna MacDonald a gift of appreciation for the tremendous job he has done as UWRA President and for the support of his wife, Hanna, in this endeavor. UWRA Board members gave Dan and Hanna a standing ovation and expression of appreciation for the great work, time and

effort that he and Hanna have given to this job in preparing us for the next century.

Vais stated that we have stabilized our campaign efforts, that we have an excellent newsletter in "UPDATES" and a very competent editor in Bill Tracy, and that the two areas which need work are program and membership. He announced that George Wilkinson has agreed to be vice president of program. Vais passed out a new UWRA organization chart. (See page 11)

BOARD MEETINGS-2000: The President stated that the UWRA board will meet at the Community Leaders Conference in Los Angeles on Friday, April 14, 2000.

There will be a small contingent of the board at the Staff Leaders Conference in Houston, February 10-12. We will have a UWRA exhibit booth at the SLC and need volunteers to staff it Friday, October 20, 2000, at UWA Headquarters in Alexandria will be the second official board meeting.

NEW EXECUTIVE DIRECTOR: Lyanne Wasserman spoke briefly and stated that she was looking forward with enthusiasm to working with the Retirees Association. She stated that anyone can e-mail her at bartnw@aol.com. Lyanne advised that she would officially begin working on January 18, 2000. She and her husband are taking a trip to Australia, leaving in December for a month, but would be available to work with any Board member on the following dates: December 2, 3, 6, 7, 8 and 9th.

The meeting was adjourned.

Respectfully submitted,

Joan Dixon



Progress Report (continued from page 3)

increased substantially, thanks to an aggressive campaign team. Current figures represent "work in progress" but we know that local United Way giving has grown in double digit percentages each year. So has leadership contributions.

- Mutual of America has provided a grant of \$5,000 in each of the past two years.

- United Way of America, in addition to providing more than \$20,000 of in-kind services (space, bookkeeping, etc), has agreed to a grant of \$25,000 in each of the next two years plus setting aside \$15,000 as a challenge to match UWRA's fund raising success (excess) over its projected goals.

- The association's board of directors (34 elected) has been diversified to include most career disciplines in the field, increase the role of women and reduce the percentage of CPO members to less than one-third. Attendance at semi-annual board meetings has exceeded 90%.

- On the recommendation of and with the help of UWA's legal counsel, the association has voted to incorporate as a 501 (c) 3 organization.

- UWRA has completed the search for and is about to employ its first part-time executive director to coordinate and manage its operations.

- A first biennial Work Program was established for 1997-1999 and has been updated to begin the millennium, 2000-01.

- The association's newsletter and lifeline to its membership, UPDATES, has been radically redesigned and is now published four instead of two times each year.

- UWRA is represented on the National Professional Council, an advisory group to the president of UWA and will also be a participant in other key groups at the national and regional levels.

- Retiree association members are active on planning committees for the Staff Leaders and Community Leaders Conferences. UWRA is assuming responsibility for the recognition programs for Thirty-Year career employees in the field.

- UWRA's first experience on the Internet is its web site (uwra.org) established with the sponsorship of the United Way of Southern Nevada (**Garth Winkler**, CPO) and directed by Web Master **Albert Weiss**. Initial content

continued on next page

MEMBERS!

Please Read

Myron Liner's Article:

Should We Change Our Name?

And then send your ideas to him.

That would be helpful to the association.

Many thanks.

Progress Report (continued from previous page)

includes a membership roster, UPDATES newsletter, message board and chat rooms. Subscribers to UWA's United Way Online can also tap directly into UWRA with a flick of the mouse.

- Basic design of Career Transition programs has been commissioned by UWRA and will soon be available for use by state and local United Way organizations.

- The association is working with the National Academy for Voluntarism to provide personnel for training programs.

- A Speakers Bureau has been organized at the instigation of UWA Field Services and can provide speakers for annual meetings and campaign kickoffs.

- A growing number of local United Ways have been providing "homecomings" or "gatherings" of retired employees as well as providing resources for annual or more frequent meetings.

- More than twenty retirees are assisting in the National Corporate Leadership program by gathering business information useful to the NCL staff.

- UWRA is beginning work with UWA staff to launch retiree involvement in promoting and developing planned giving programs at the local level.

- Retiree liaison has been assigned to work with United Way International and some assistance has been giving in securing foundation funding.

- UWRA has participated with UWA in raising contributions for the Lyman Ford Memorial Fund as well as planning the use of proceeds.

- Conversations are underway with organizations which provide health benefit programs for retiree associations with a view to making them available to UWRA members.

- A separate exploration of a committee for pension and health benefits is also underway.

- A number of members have participated in association cruises which have been well received. A committee has been established to seek out other varied adventures which are interesting and affordable.

- Office space for UWRA staff at UWA has been doubled to accommodate the increased workload of both staff and volunteers. ☐

Don Sanders (continued from page 4)

work: services to the field by stressing the use of retiree skills in local UWs and local and regional agencies, and service to retirees themselves, such as continuing communications and ongoing review of the needs of retirees now and in the future (such as benefits). I see a growing acceptance of the association by UWA and locals. Our mutual dependence becomes ever more clear. We will grow in numbers and effect through the years.

"As a individual, I have both enjoyed and been continuously moved by my involvement with United Way. Community development and improvement is both fun and where this social worker's heart is centered."

Don was born in Washington, D.C. and was educated in the District's elementary and secondary schools. He later attended Duke University in Durham, NC for his bachelor of arts (sociology and psychology) and the University of North Carolina, Chapel Hill for his masters degree in social work and community organization.

During his professional career he attended a variety of training courses in planning, fund raising, management, deferred giving and media relations. He served as faculty with the National Academy of Voluntarism, UWA; past president of the Southeast Regional Conference (UWA); member of the National Professional Advisory Council (UWA) and other committees.

In 1982, at the request of United Way International, he spent eight weeks as a special consultant to the United Way of Auckland, New Zealand, to help the Auckland community redefine and strengthen its attempt to create a United Way organization.

Don and his wife, Mary, have four children, all married, and nine grandchildren. ☐

Eugene Berres (continued from page 4)

dation for our values, beliefs and community status. Old timers whom I looked to for help and guidance were **Harold Weekley, Bill Kaufman, Tim Sheetz, Gordon Berg, Gus Shea, Paul Akauna, Morris Smith and Dick O'Brien**, people of talent, dedication, character and commitment."

Over the past several years Gene, with others, has been helping the fund raising for UWRA which has increased from \$10,000 to \$70,000 because of the interest of many local United Ways and leadership gifts from dues paying members. Says Gene, "I believe we are now getting positioned financially to get our programs rolling. It took four years to get us to this point. Sometimes it was slow, but the pace has definitely picked up now that we have money for program development. We owe a lot to some hard working retirees like **Don Morgan, Dick Fusco, Don Sanders, Dan MacDonald and Tom Vais** for hanging in there to keep the momentum going."

Gene has served on the UWRA's board of directors for the past four years. He notes, "As the UWRA started to regroup after 1992, old pros like **Gordon Berg, Chuck Devine, Don Morgan, Al Cooper and Bill Kerrigan** went to work to structure an organization of retirees dedicated to keeping the spirit of the United Way alive in the hearts and lives of all those United Way staff people who helped build caring communities. Our goals and objectives are clearly spelled out. Now we have the big job of putting in place meaningful programs to achieve our mission.

"The year 2000 for UWRA is something we can all celebrate. As United Way retirees we can look back with pride knowing that we built better communities all across America and abroad as well." ☐

Do You Feel Old Yet? (continued from page 5)

19. The Compact Disc was introduced when they were 1 year old.
20. As far as they know, stamps have always cost about 32 cents.
21. They have always had an answering machine.
22. Most have never seen a TV set with only 13 channels, nor have they seen a black-and-white TV.
23. They have always had cable.
24. There have always been VCR's, but they have no idea what BETA is.
25. They cannot fathom not having a remote control.
26. They were born the year that Walkmen were introduced by Sony.
27. Roller-skating has always meant inline for them.
28. The Tonight Show has always been with Jay Leno.
29. They have no idea when or why Jordache jeans were cool.
30. Popcorn has always been cooked in the microwave.
31. They have never seen Larry Bird play, and Kareem Abdul-Jabbar is a football player.
32. They never took a swim and thought about Jaws.
33. The Vietnam War is as ancient history to them as WWI, WWII or even the Civil War.
34. They have no idea that Americans were ever held hostage in Iran.
35. They can't imagine what hard contact lenses are.
36. They don't know who Mork was or where he was from.
37. They never heard: "Where's the beef?," "I'd walk a mile for a Camel," or "de plane, de plane!"
38. They do not care who shot J.R. and have no idea who J.R. is.
39. The Titanic was found? I thought we always knew where it was.
40. Michael Jackson has always been white.
41. Kansas, Chicago, Boston, America, and Alabama are places, not groups.
42. McDonald's never came in Styrofoam containers.
43. There has always been MTV.
44. Dial telephones!!!!

Do you feel old yet?

*Not My World Anymore (continued from page 6)*

that a stupid statement, MS)

It seems there are stages we go through in life. Our childhood is spent in joyous oblivion, learning and seeing new things wherever we go and whatever we do. By our teenage years, we know everything and it's all boring because we've been there, done that and the joyous oblivion is gone. We don't know or understand that is what's happening but it is.

Then we find the opposite sex to replace the joyous oblivion and the world changes to the procreation process and the development of the skills necessary to find a mate, mate and support the family. This process takes us into our 30s when, for me at least, we wake up one day and realize we are no longer children and can now shape our own destiny. What I mean by that is I found myself at the age of 35 or so realizing I was reacting to life the way my parents had taught me and it was at that point that I understood I could and should make my own decisions about where I was going and who I was going to be. I could change my habits if I chose to.

During our 20s, 30s, 40s and, if we are lucky, 50s, we work hard to build our world as we want it to be. As a generation of Baby Boomers, we had our own music, pop culture, Vietnam etc., etc., etc. We had the world by the tail as it's said. It's an ongoing process. As we were getting our world in the shape we wanted, we were pushing our parents and grand parents world out of the way. Ironically our children that we brought into this world were already beginning to push us out of our world but we don't see it until its there. We couldn't change it if we did know it was happening,

Actually, it has to happen this way when you think about it. If it didn't, we wouldn't progress and the next generation could never take us into tomorrow. We'd be stuck in time!

Likewise, the process of aging happens the same way. Look at it this way. I am now 100 years old. During my life I have had my family, my music, my job, my friends, etc. Because I have outlived the average age of 72, I have now seen my world go past me and I'm in a world that I didn't make. Most if not all of my children are probably dead, all of my friends are gone, my spouse has departed, and the world, as I knew it and was comfortable with, has changed into something I don't like and am not comfortable with. Whoever imagined we'd paint our bodies and have jewelry

hanging from every part we could pierce.

About this time it's time to go. I want to go and look forward to what's beyond life as we know it. The aging process has done its job and I'm ready. The world's natural state is in order and I've fretted for nothing as usual.

Enjoy your time in life. It goes by very quickly and it's later than you think. Let your friends and family know how much you love and enjoy them.

Until next time. *Mike*

*Humor Health Facts (continued from page 8)*

psychological tasks found to be common in healthy marriage relationships.

Studies now support the idea that people who laugh regularly respond better to treatment for disease.

Laughter has shown to affect the immune system, increasing the number of activated T-cells.



For All Members

Please, Please, Please

Send any change of address
or telephone numbers to
Anne Hunt at the UWRA
office in Alexandria.

And you are urged to keep
Anne informed of your
current e-mail and fax
numbers.

You will find Anne's
addresses—mail, e-mail,
fax, telephone—on the
UPDATES page listing the
UWRA officers.



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