

UWRA

2012 in review (annual report posted on www.UWRA.org)

Mission: *To improve the lives of current and future United Way retirees/alumni and using their skills and talents to help strengthen communities served by United Way.*

UWRA FOCUS:

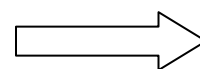
- **Inviting** - inviting United Way staff to stay connected and involved
- **Connecting** - connecting members to each other, resources, and volunteer/interim opportunities
- **Committing** - committing to making a difference, transmitting knowledge and mobilizing our unique resources (i.e., the experience and expertise of UWRA members) for change
- **Partnering** - partnering to insure a vital system of support for current/future retirees and the network of local United Ways

Highlighted below and expounded upon on our website (www.UWRA.org), UWRA works in various ways to **preserve and strengthen connections** and to **use the assets of the organization** (i.e., the experience and expertise of UWRA members) **to make a difference.**

KEY ACCOMPLISHMENTS IN 2012 - MAKING CONNECTIONS:

Communication...connection...camaraderie...

- **UPDATES – UWRA Quarterly Newsletter:** distributed to UWRA members and all United Ways (through a combination of hard copy and electronic methods) emerged from our 2011 study as one of the top rated items that appeal to UWRA members because it promotes connectivity to colleagues and United Way.
- **UWRA website and listserv** - UWRA rebuilt the website (www.UWRA.org) in a concerted effort to more effectively communicate the work of the organization; and added more members to the UWRA listserv (85% of membership subscribed) – a valued and appreciated vehicle to effectively communicate information and opportunities.
- **United Way Online** – In 2012 UWRA participated in a knowledge group tasked with cleaning up and improving the usability and functionality of the United Way internal website - UWOnline. In addition to working on keeping content updated, relevant and brand compliant; and improving the navigation and search-ability of the site; the Knowledge Cabinet recommended organizational knowledge sharing practices. UWRA rebuilt the organization's internal website area to more clearly define the UWRA brand and services. UWRA membership is the only way former staff have access to this valuable tool that helps keep United Way alumni connected to the activities, direction and mission of United Way.
- **Regional Gatherings** – UWRA expanded the opportunity for members to convene and keep in contact with colleagues by adding an annual gathering more accessible to members in the western section of the country (2011 and 2012 event in Lake Tahoe and San Diego areas, respectively and planning a 2013 gathering in Las Vegas) to complement the annual event held at Wildacres in North Carolina.
- **Partnerships** – in 2012 UWRA was as active participant in national level task force work as well as continuing to foster other partnership activities at the local, state and national levels.
- **Gold Standard United Ways** – UWRA worked to further engage the network's help to keep their United Way alumni connected and current employees aware of how UWRA can be a valuable resource to potentially assist in their work. In 2012 UWRA added several more **Gold Standard United Ways** – i.e., United Ways paying dues for their retirees/alumni.



KEY ACCOMPLISHMENTS IN 2012 - MAKING A DIFFERENCE:

Those who served are still serving...

In addition to working to preserve connections along various dimensions, UWRA utilizes the experience and expertise of members to support current and former staff, and local and state United Way organizations. Just a few of the examples of how our dedicated Service Corps continues to serve the movement are listed below:

- **Retirement Planning Initiative** – In 2011 UWRA launched a Webinar series with the initial offering stressing the critical importance of lifelong retirement planning. The series continued in 2012 with Webinar #2, *Helping United Way Staff Plan for Retirement* which was geared to CEOs and Human Resource Professionals to initiate a dialogue between United Ways around some major retirement issues and ways that they may be able to help their employees to plan more effectively for their retirement. Replay links and the PowerPoint Presentations can be found on www.UWRA.org.
- **Interim Staffing Placement** – In 2012 when a Metro III was in immediate need of an interim CEO, UWRA helped fill the position by posting the opportunity on the UWRA listserv which reaches over 500 experienced United Way people. Testimonies available on www.UWRA.org.
- **Endowment and Planned Giving program** – UWRA has provided guidance on establishing endowment & planned giving programs to numerous local United Ways including conducting in 2012 an on-site feasibility study process with 7 United Ways adding in total over 1.5 million in expectancies to the United Way network through this program. UWRA led a session at the 2012 Great Rivers Conference on Planned Giving and is co-presenting a pre-session geared to Small City United Ways and staff new to planned giving at the 2013 Planned Giving Institute. For more information visit the UWW Learning Catalog - EPG: On-site Training and Consultation Learning Opportunity or go to www.UWRA.org.
- **Onboarding new United Way Executives** - In 2011 UWRA helped the rollout of an updated *Quickstart Guide for New UW Executives* and created a new section on how to manage the first few months on the job, and in 2012 work continued in a UWRA led task force geared to evaluating the performance of the online mentoring resource for the United Way network which UWRA helped launch in 2009; and developing a mentoring model for the network.
- **United Way history** – In 2012 UWRA collaborated with the United Way Worldwide learning division to develop a value added learning product geared to retaining and leveraging institutional knowledge which focused on interviewing UWRA Board members to share lessons learned, reflections and aspirations through a forward looking lens around ways to advance the new United Way business model.
- **Council of States partnership** – In 2012 UWRA worked to further the partnership with State Associations including sharing a comprehensive packet of UWRA offerings so that State Associations may assist in cascading the message about programs and services that support local United Ways; and also encourage personal membership in UWRA.
- **UWRA facilitated agreement with United Way in Malaysia** – In 2012 UWRA and United Way Worldwide cooperated to deploy UWRA volunteer Yezdyar Kaoosji on an international assignment to help reestablish a United Way partner organization in Malaysia. The partnership agreement with the Malaysian Humanitarian Foundation (MHF)/ United Way Malaysia (UWM) should be finalized by early 2013.
- **Advocacy** – In 2012 UWRA promoted advocacy engagement of UWRA members around United Way Worldwide policy and action priorities including the 2-1-1 helpline, preservation of the charitable income deduction, and the United Way Day of Action; in addition to encouraging members to keep abreast of network wide advocacy opportunities and to check with their local United Ways to assist local initiatives.