

UWRA

UNITED WAY RETIREES ASSOCIATION

2016 ANNUAL REPORT



**PARTNERS IN ADVANCING
THE COMMON GOOD**

UWRA – THE WAY TO STAY UNITED

UWRA.org



UWRA

UNITED WAY RETIREES ASSOCIATION

UWRA MISSION

To enrich the lives of current and future United Way retirees/alumni by helping them stay connected and by using their skills and talents to assist United Ways in serving their communities.

UWRA VISION

UWRA will be acknowledged as a valued provider of assistance to retirees/alumni, United Ways, their communities and other nonprofits.

History: UWRA was started in 1989 by United Way alumni to promote the continued involvement of United Way retirees/alumni, and to educate the non-profit sector on the advantages of utilizing the skills and expertise of former staff. UWRA received 501 (c) 3 public charity status in 2001; and membership currently includes approximately 500 individual members (current and former staff), and 200 supporting United Ways. UWRA is a resource for the United Way network serving United Way organizations and their current/former staff through a portfolio of programs, projects, and special initiatives.



MESSAGE TO THE UNITED WAY COMMUNITY

UWRA expands the bandwidth of the United Way network by using the rich experience and expertise of our members (i.e., United Way alumni and current staff). The association is also a valued mechanism helping to keep United Way staff and alumni connected to each other and the mission. And through strategic partnerships, collaborative work, the dedication of volunteers, and the support of the United Way family we are achieving measurable results.

As highlighted throughout this report, 2016 was another active and productive year at UWRA. We fight for continued connections and the value of experience - no other organization does this. We are uniquely positioned and committed to using our resources and assets to help strengthen the network. And we need your help. As many of you know, UWRA is an independent nonprofit 501(c) 3 organization, and we operate on a very tight budget. We are deeply grateful to all who Give, Advocate, and Volunteer in partnership with us. Donations come in many forms – your Time, Talent and Treasures are all so valued:

- **Give.** UWRA is funded largely by the generous support of individuals and United Way organizations (national, state and local). Giving to UWRA ensures your dollars are making a difference by supporting a commitment to embracing the value of experience, as well as the immeasurable benefits around keeping connections active and vibrant.
- **Advocate.** Talk about the work UWRA does. Be our ambassadors and allies. We count on you to share with your colleagues and United Ways how we can help and the good we are doing.
- **Volunteer.** Volunteers are our lifeline! There are a variety of ways to get involved.

For more than 25 years UWRA has been on this journey, and we thank you for being a part of our progress. Let's continue to work together with the mutual goal of making the United Way network as strong as it can be. Last year was also a year of introspection for UWRA - to ensure that as we evolve we are best meeting the ever changing needs and desires of our members and the network. As we continue this effort we will be reaching out for your feedback to give us added insight, and help us focus our efforts to make the most meaningful impact possible in 2017 and beyond.

This report is a celebration of a network mobilizing and engaging in system citizenship to support our current and future United Way alumni; and honoring and valuing the United Way expertise and experience our members bring to the table. And we so appreciate your help in making this all possible, and if you are not currently supporting UWRA we invite you to join us! As emphasized at the 2016 Community Leaders Conference we are ALL IN TOGETHER!! And we look forward to all of our future successes TOGETHER.

Thank you so very much!



Mike McLarney
Board Chair, UWRA



Patricia R. Smith
President and CEO, UWRA

ABOUT UWRA

An organization serving the United Way family – current professionals, alumni and retirees

A Membership Association dedicated to enriching the lives of current and future United Way retirees/ alumni by helping them stay connected and by using their skills and talents to assist United Ways in serving their communities.

FOCUS: *To execute on our mission we will focus on:*

- **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 and future retirees/alumni and the network of local United Ways

PURPOSE: *To guide our work we will concentrate on providing the following:*

- **Opportunities to maintain and enhance relationships** (e.g., newsletter, gatherings, listserv, etc.)
- **Programs that transmit knowledge to future generations** (e.g., endowment & planned giving assistance, retirement planning information, etc.)
- **Opportunities for members to continue to serve the needs of the United Way network** (e.g., mentoring/coaching, interim assistance)
- **Service to members, as appropriate** (e.g., discount programs, webinars)
- **Leadership in the preservation of the history and traditions of the United Way network** (e.g., publications, posters, banner, videos)

PRIORITIES: *To execute in a targeted manner on our purposes we will place precedence on the following areas:*

- **Communication/Connections Opportunities** – Newsletter, Gatherings, Listserv, Website, Social Media, etc.
- **Retirement Planning Initiative**
- **Endowment & Planned Giving Assistance** to local United Ways
- **Mentoring/Coaching United Way staff** around a variety of areas
- **Interim Staff Assistance**
- **Leadership in Preservation of United Way history**

MEMBERSHIP:

- **Composition:** Approximately 500 individual members nationwide representing both former and current United Way staff; and over 200 supporting state and local United Ways.
- **Characteristics:** Membership in UWRA is about tenure in and commitment to the United Way movement.
- **Distinction:** Key attributes that differentiate UWRA:
 - Only organization that focuses on current and future United Way alumni/retirees
 - Unique pool of people representing experience, expertise, and knowledge of United Way
 - Willingness to give back and share talents & experience for the advancement of the United Way network combined with the ability to bring rich lessons learned information to initiatives
 - The best means for United Way alumni to keep connected to the mission and colleagues
 - The best resource for linking United Ways' interim staff needs to experienced professionals
 - Global coverage

ORGANIZATIONAL STRUCTURE:

- Founded in 1989; 501 (c) 3 public charity status in 2001
- Governed by a 15 member volunteer Board, one full time and one part time staff members
- Volunteer Service Corps representing all levels of United Way staff

More than a slogan, LIVE UNITED is a declaration and an invitation to give, advocate and volunteer in the areas of education, income and health. For UWRA this means our commitment to enriching the lives of United Way current and future retirees and using their skills to help strengthen communities served by United Way. To assist the United Way network in mobilizing around the issue areas of **health, income and education** and provide services to our members UWRA has concentrated on the following impact areas:

- Better quality retirement
- Leadership and skill development in Local United Ways
- Adding resources (fiscal and volunteer) to the United Way network
- Strengthening the network and services for current and future United Way alumni

MAKING A DIFFERENCE: *Those who served are still serving...*

MAKING CONNECTIONS: *Communication...connection...camaraderie...*

The above captures very succinctly what UWRA is all about. Using the expertise of United Way alumni to make a difference and keeping connections vibrant and active. Highlighted below and expounded upon on our external website (www.UWRA.org) and the *Retirees and Alumni* section on United Way Online, are some of the ways UWRA utilizes the experience and expertise of members to support current and former staff, and local and state United Way organizations. Together, we are continuing to make progress on realizing our collective vision of being a valued provider of assistance.

KEY ACCOMPLISHMENTS IN 2016 - MAKING A DIFFERENCE:

Those who served are still serving...

THE VALUE OF EXPERIENCE: **UWRA is dedicated to not letting expertise walk out the door when people leave United Way** - a few highlights of how our dedicated Service Corps served the network in 2016 include:

- Helping the United Way network with mentoring needs.
- Providing resources to help advance the United Way network's engagement of the boomer/retiree market.
- The help that our wonderful Endowment and Planned Giving program volunteers provide to the network including mentoring, case development guidance, well received Webinars, and conference presentations.
- Well received archived Retirement Planning webinars using lessons learned from those who have been there.
- Experienced former United Way employees available for interim staffing assistance.
- Leadership in the preservation of United Way history.

MENTORING/COACHING

Over the years UWRA has assisted nearly 100 United Way staff with mentoring needs. In 2016 UWRA launched a new Mentoring initiative in partnership with the United Way Worldwide Talent team, presenting an opportunity for new CEOs to tap into the rich experience of the UWRA volunteer base. UWRA mentors provide a valuable dimension of support to help new executives better navigate issues they face early in their tenure as a complement to the on-boarding resources and tools available from United Way Worldwide. Plans are to expand the pilot initiative beyond CEOs, and have more opportunities for UWRA members and United Way staff who wish to participate. Start your mentoring journey today by checking out the United Way Mentor Match on the Career Management area of United Way Online.

ENGAGING THE BOOMER/RETIREE MARKET SEGMENT

Advancing the United Way network's engagement of the boomer/retiree market segment has been an issue area of focus for UWRA. Many United Ways are missing out on a wonderful resource when they lose touch with baby boomers/retirees as they leave the workplace. This group represents a strong loyal donor base (for annual, endowment and planned gifts), an expanding revenue opportunity as a rapidly growing segment of our society, and a skilled volunteer corps that can buttress and enhance United Way initiatives.

- ▶ **"Boomers Away! Strategies to Engage Retirees" Community Leaders Conference Session:** Representatives from UWRA, the United Way Centraide Windsor-Essex County (Windsor, Ontario), United Way Centraide Canada (Ottawa, ON), United Way of Massachusetts Bay and Merrimack Valley (Boston, Massachusetts), and the Valley of the Sun United Way (Phoenix, Arizona) joined forces to deliver one of the highest rated sessions (91% user satisfaction) at the 2016 Community Leaders Conference.

UWRA moderated the session in which the local United Ways presented two approaches to capturing and engaging the boomer/retiree market segment.



Group 1: UNITED IN RETIREMENT: A pilot program for retiree engagement, crafted with significant stakeholder input, designed to help engage those who are retired or who are approaching retirement at our workplaces, partner agencies and in the wider community.

Group 2: LABOUR RETIREE ENGAGEMENT STRATEGY: By partnering with workplaces, labour bodies, union affiliates, corporations, and retiree chapters, United Ways can retain donors and provide opportunities for retirees to stay connected, active and involved in their communities.

"This was the best session I attended."

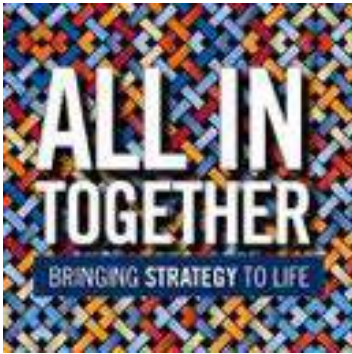
"Superb!"

"The resources offered for sharing were excellent and the topic was timely and well attended. This is an area it may have been better to have as a general session. It was of universal appeal and the room was packed with no seating."

"Best session of the conference and timely as we embark on developing a retiree strategy"

"The speakers were great and the content valuable. The audience was clearly engaged, I think questions & answers could have continued for another hour."

- ▶ **"Boomers Away! Strategies to Engage Retirees" Webinar:** The Community Leaders Conference session resonated so well with the audience, UWRA and the local United Ways presenters recorded a Webinar version of the session with numerous downloadable resources, available on UWOnline.



"This information on retirees' engagement is awesome! Thanks, this engagement of retirees will pay off in the long run..."

"Outstanding information. Thank you"

"I came on-board as a new Executive Director just before the CLC this year, so was certainly unable to attend. Being a "Boomer" myself, I am well acquainted with the cultural implications of our age group, and want to tap into that reservoir of expertise and energy for our local United Way. This information, and these tools will certainly expedite my efforts. Thanks for making it unnecessary for reinvention of the wheel!"

► **"Tapping the Baby Boomer/Retiree Market" Idea Document:** This UWRA document presents many ideas for retaining retirees as donors, advocates, & volunteers with links to local United Way work. The document also outlines factors that influence the strategic importance of the baby boomer/retiree market, and key points to keep in mind as United Ways develop a boomer/retiree strategy for their local community. Available on UWOnline.

"I am writing to let you know that United Way Centraide Canada has chosen to feature for their staff, content that UWRA provided through UWO. They have translated selected documents to French and we've added those French translations to the corresponding UWO pages... of many thousands of pages and posts, a small set of about 20 documents – of which your page was one, were deemed particularly important for their staff. Just wanted to let you know and to say thank you for posting! (United Way Worldwide Manager Content Curation)

► **"Engagement of Retirees/Boomers!" Great Rivers Session:** United Way research shows that our boomers and retirees are our most loyal and strongest donors. This combined with the substantial number of boomers that are retiring, and the unprecedented wealth transfer that will be happening from 2016 to 2050, illustrates how vitally important it is to cultivate the baby boomer/retiree market for planned gifts or endowed gifts with conversations on how donors can continue their legacy of giving and impacting their community. Also keeping boomers actively engaged in our work as they retire is an opportunity United Ways should not be missing. UWRA was chosen in the 2016 selection process to present a session at the 2017 Great Rivers conference focusing on United Way giving engagement strategies for the retiree/boomer market led by UWRA volunteer Monica Estabrooke.

GENERATIONAL BUSINESS STRATEGIES

Throughout the United Way network, we take into account multi-generational strategies in everything we do. Whether it's the retiring Baby Boomers, the exploding Millennial workforce, or the Generation Xers advancing into the most influential decision-making roles across the globe, our engagement of each of these demographics as leaders, donors and volunteers is critical to the success of United Way's mission.

"The Generational Disruption Of Philanthropy, Boomers, X'ers and Millennials, Oh My!" - UWRA and United Way Worldwide partnered to host this special brown-bag lunch session, with Chuck Underwood, one of the pioneers who created and popularized the field of generational study - and with it, generational business strategies. Chuck consults and trains American business, government, education, religion, and other institutions on Generational Marketplace Strategies, Generational Workforce Strategies, and other niche applications of generational study. UWRA facilitated arranging for this in demand presenter to speak pro-bono with UWW staff and the UWRA board about how to better understand each generation and most importantly, how to successfully engage them. Chuck discussed how generational



Chuck Underwood with the UWRA Board and staff **Back Row:** Tricia Smith, Susan Dunn, Roger Frick, Carole Watson, Bill Mills, Lovell Mosely, Ed John **Middle Row:** Susan Gilmore, Carl Zapora, Ralph Gregory, Chuck Underwood (guest speaker) **Front Row:** David Lee, Mike McLarney, Dick Aft, Judy Quinlan

opportunities for United Way span across marketplace (e.g., marketing, relationships, products) and workplace (e.g., recruitments, training, management) dynamics; and employing these strategies as the underpinnings of our work can make our efforts richer and more effective.

ENDOWMENT AND PLANNED GIVING (EPG) ASSISTANCE PROGRAM

UWRA has provided guidance on establishing or strengthening endowment and planned giving programs to numerous local United Ways adding over 3 million in expectancies to the United Way network through this program. The EPG program is powered by UWRA volunteers who have had many years within United Way, and who have an expertise in Endowment Development/Planned Giving. Some of 2016 work/accomplishments in this area include:



Making an Ask of a Millennial/Young Leader

➤ **Role Playing Video Series Launch:** A very well received series of nine role playing videos designed to enhance gift asks of donors. Some United Ways are also using them as educational pieces at Board Meetings. UWRA member content developers/actors in these videos collectively have approximately 175 years of United Way experience! The project was a collaborative effort with United Way Worldwide and grant funding was provided to UWRA by the IBM Community Service Grant Program.

1. Making an Effective Planned Giving Ask
2. Making an Ask for a Transformational Gift
3. Making an Ask for an Endowment Gift
4. Making an Ask for a Donor to Endow Their Annual Gift
5. **Making an Ask of a Millennial/Young Leader (photo)**
6. Helping a Donor Identify the Optimal EPG Vehicle
7. Overcoming Objections - Part 1
8. Overcoming Objections - Part 2
9. Insights & Tips

"I watched ALL these videos - they were TERRIFIC!!!" Kerri Strauss, ED, United Way of Bradford County, Towanda PA

"Lots of kudos to you, UWRA, and IBM for capturing and presenting some of the best 'classic' hits of how to do our job! I will be using a few of the videos in the next two months with both staff and volunteers. These video tools are so much more useful than books and handouts. Please pass along our deep thanks to all the sponsors and 'stars' as well as the screenwriters and production people. You have weeks of fundraising best practices and book learning compressed into short, but impactful directions. They are helpful to a wide range of audiences, from newcomer to very experienced people, from younger to more senior ages. Thank you!" G. Paul Didier, CEO United Way of Santa Barbara County

➤ **Planned Giving Conference Sessions:** UWRA volunteer Tom Brown helped moderate a 2016 Fundraising for Impact Conference session *"Planned Giving – Engaging Donors beyond the Traditional Gift"*.

➤ **Personal Coaching Assistance:** In addition to numerous informal mentoring/coaching engagements to assist in developing or strengthening local United Way planned giving programs, UWRA led the United Way of Portage County (Metro 3 in Stevens Point WI) through a case development process.

➤ **Informative Webinars:** Anniversary campaigns that celebrate a milestone in the life of a United Way can help generate visibility, donors and dollars, highlight a new impact initiative, and boost a corporate partnership. UWRA volunteer Monica Estabrooke was a featured speaker on a webinar aimed at helping smaller United Ways with this topic area; and Monica serves as a coaching resource for UWs who would like guidance with Anniversary campaigns. Archived webinars also include a very highly rated Endowment & Planned Giving Webinar designed to assist smaller United Ways.

➤ **Tocqueville Legacy:** UWRA is a resource to assist United Ways in deepening Tocqueville commitments. UWRA volunteers have been featured speakers on monthly UWW conference calls on this topic.

➤ **Statewide Initiative to grow Tocqueville giving:** UWRA Board member David Lee is working with UWW to develop a NJ Tocqueville Coalition of Community Volunteers to promote and grow Tocqueville giving.

RETIREMENT PLANNING INITIATIVE

UWRA has been engaged in a multi-year effort geared to encouraging and empowering current and former United Way staff to take the initiative in planning for their retirement and to view these actions as a lifelong effort. The focus of the initiative is to help United Way colleagues more successfully navigate the journey to retirement, in part by drawing on lessons learned from those who have been there. In addition to publications and other helpful resources, UWRA has committed resources, and received two IBM Community Service grants, to producing a Webinar series dedicated to addressing significant issues around retirement planning and living in retirement. The six-part Webinar series is posted in the *Retirees and Alumni* group on United Way Online:

1. **Planning for Retirement in an Era of Uncertainty!!**
2. **Helping United Way Staff Plan for Retirement**
3. **The Process of Retirement Planning/Estate Planning**
4. **Don't Let the Future Surprise You!** featuring Jeri Sedlar who co-authored with husband Rick Miners the book *Don't Retire, REWIRE!*
5. **Reorienting After Career**
6. **Writing a Retirement Mission Statement and/or Mantra**

INTERIM STAFFING ASSISTANCE

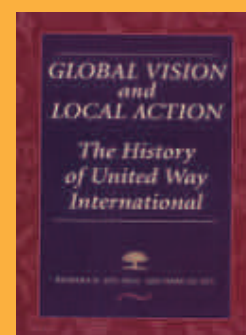
United Ways are sometimes in need of temporary extra assistance and UWRA members have served in numerous UW interim positions nationwide - able to assume these positions with no learning curve. UWRA posts these opportunities on our member listserv which reaches approximately 450 current and former UW staff. Testimonies are available on www.UWRA.org.

UNITED WAY HISTORY

UWRA is committed to the preservation and valuing of United Way history through publications, posters, videos, website narratives, articles etc.; and works to retain and leverage institutional knowledge through a variety of forums.

UNITED WAY ADVOCACY

UWRA promotes advocacy engagement of UWRA members around United Way Worldwide policy and action priorities; and encourages members to keep abreast of network wide advocacy opportunities through the UWW Policy eNewsletter, as well as checking with their local United Ways to assist local/state initiatives.



Go to www.UWRA.org to order the national and international United Way history books. All proceeds from the sales of these books are contributed to United Way endowment funds.



KEY ACCOMPLISHMENTS IN 2016 - MAKING CONNECTIONS:

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

THE VALUE OF CONNECTIONS: UWRA works to preserve connections along various dimensions including:

- Continuing to produce a high quality newsletter that is enjoyed.
- Holding gatherings that are very much enjoyed by those who attend.
- Expanding our social media footprint to help cascade our message and promote additional connectivity venues.
- Establishing Partnerships to help advance our work.



UPDATES – UWRA Quarterly Newsletter

The UWRA newsletter, distributed to individual members and all United Ways (through a combination of hard copy and electronic methods), emerged from our recent member study as one of the top rated items that appeal to UWRA members because it promotes connectivity to colleagues and United Way. In response to survey feedback we are balancing the appeal around staying connected and special interest stories; with accomplishments and happenings that lift up UWRA's mission focused work around using the "value of experience"; as well as some key United Way network *All in this Together* items.

FORUMS TO STAY CONNECTED

UWRA is one of the best ways to stay connected with United Way. UWRA provides access to resources such as United Ways internal web platform (UWOnline), and forums for members to express their issues and concerns and stay in touch with each other and the UW network - through gatherings, the UWRA listserv and website, UWRAConnect Facebook, & Webinars.

- **External website and listserv:** UWRA maintains valued and appreciated vehicles such as the www.UWRA.org website and a member listserv to effectively communicate information and opportunities.
- **United Way Online:** UWRA strives to keep United Way alumni connected through the United Way Online *Retirees and Alumni Group*. UWRA membership is the only way former staff have access to this valuable tool that helps keep alumni connected to the activities, direction and mission of United Way.
- **UWRACONNECT:** is a Facebook Group developed for United Way Colleagues focusing on:
 - Providing a networking opportunity for United Way colleagues to re-connect in a fun way!
 - Serving as a forum to share personal, professional, and retirement experiences – and photos!
 - Cascading the UWRA message to non-members to join UWRA!
- **Support of local efforts:** UWRA offers support to local efforts to connect United Way colleagues. The United Way of the Bay Area (UWBA) has sponsored several Retirees and Alumni Association (UWBARAA) networking events that brought together retirees and alumni as well as current long tenured UWBA employees. The UWBARAA looks forward to sharing their experiences with other United Ways on developing a local UWRA affinity group.



► **Gatherings:** To foster continued connections UWRA held a successful 2016 spring gathering of Retirees, Alumni and guests in Newport Beach, CA; and the 21st year fall gathering at Wildacres Retreat Conference Center in NC!

Spring in Newport Beach...

"It was obvious during those three days that everyone was having a marvelous time, and that Newport Beach will be a cherished memory for all of us, in the years to come." Toni Lanford-Ferguson

Fall in Wildacres...

"While we had a small number, we had a great time!"
Linda Today

"Mark Whipple does a FANTASTIC presentation. We are so fortunate to have him with us...Our group may be small, but a wonderful comradery has formed between us." Sharron Cornelius

Partnerships - UWRA is an active participant in national level task force work as well as other partnership activities at the national, local and state levels, including:

- **Design Thinking Workshop/Innovation Lab** - Jim Yu (UWW Director IT group) lent his expertise to the Board to run Strategic Workshops geared to developing specific actions around "Redesigning the Membership Experience" in order to look at innovative ways UWRA can meet current and prospective members' needs and desires.
- **UWW Bold Play 2 Collaboration with UWRA** - Retaining retirees is part of the overall Bold Play 2 strategy and as noted on UWOnline: "UWW and the United Way Retirees Association are looking for United Ways leading the way in providing world-class experiences to Boomers as they near retirement and keeping them involved with United Way after they do." UWRA has disseminated information around this topic area through conference presentations, Webinars, and a document linking ideas to examples of local United Way work.
- **Internal and External Connections** - UWRA maintains a presence at United Way conferences such as the Community Leaders Conference, National Professional Council, New President's Forum, Great Rivers, Western Regional, and the Finance and Talent Management Forum; as well as engaging with outside groups such as AARP.



2016 Newport Beach Participants: Standing: Pat and Nicholas Fekete, Merritt Johnson, Carolyn Johnson (guest speaker – Award-winning journalist and co-anchor of the NBC4 Southern California News), Mary Ellen Monaco, Ed Parker, Teri Hancock, Tricia Smith, Sandra Rupp, Toni Lanford-Ferguson, Bill Mills, Alice Thacker, Jeanne Johnson, Linda Flor, Carl Zapora, Bob Ferriday. Sitting: Henry Monaco, Mary Goggin, Cheryl Foster, Viney Chandler and daughter Rhett, Barbara McMath. Not Pictured: Donna and Richmond Johnson, Jim Greene, and Judy Parker.

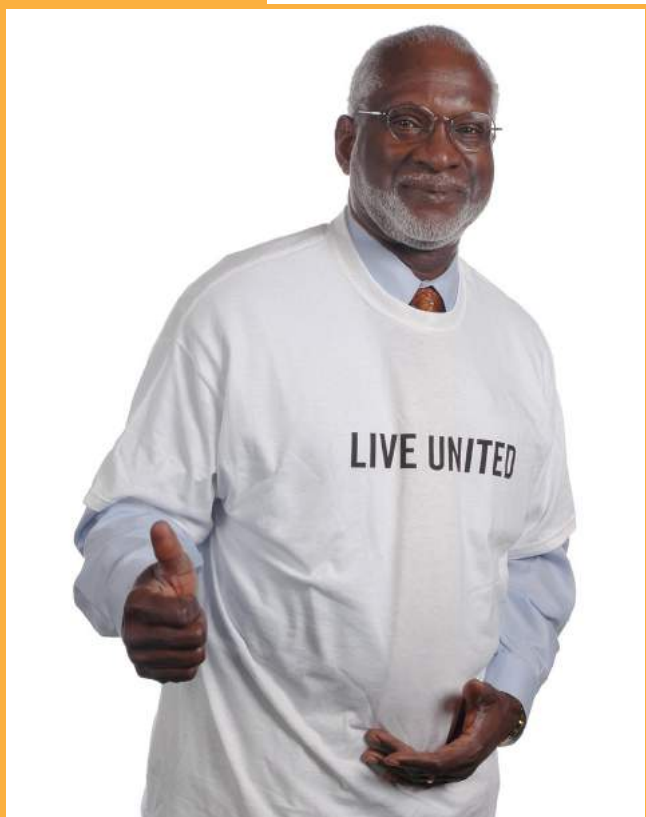


2016 Wildacres Participants: Back row: Bernie and Pat Hyman, Sharron Cornelius, Linda Today, Lynda Smith, Jim Morrison, and Nancy Provance. Front Row: Mark Whipple (guest speaker - retired astronomy high school teacher and continuing education instructor), Bob Cornelius, and John Provance.



Board Members Susan Gilmore and Mike McLarney present their Design Thinking ideas to the group.

- **UWRA GOLD STANDARD UWs:** Many of our members, still working in the network, support our work and use UWRA as a conduit to keep in touch with former colleagues, keep abreast of UWRA offerings, etc. And once people do leave United Way, UWRA is a wonderful way to keep connected with colleagues and the United Way community; and to lend expertise to help others in the network via volunteer and paid UW opportunities. UWRA works to further engage the network's help to keep United Way alumni connected and current employees aware of how UWRA can be a valuable resource to potentially assist in their work by expanding the UWRA Gold Standard United Way category (i.e., United Ways paying UWRA annual dues for their retirees/alumni and in some cases current staff also).

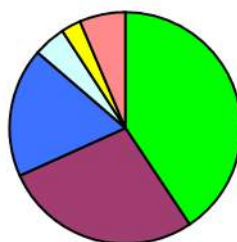


FINANCIAL SUPPORT

Please visit the UWRA website (www.UWRA.org) to view UWRA's IRS 990 form.

- **INCOME:** In 2016 UWRA was supported through the generosity of local and state United Ways (40%), United Way Worldwide (28% grant/in-kind services), Member Contributions and Leadership Gifts (18%), UWRA Endowment income (6%), Membership dues (5%), and a Mutual of America grant/Advertisements (3%).
- **EXPENSES:** As partners in advancing the common good, UWRA members have provided experienced professional services, at no or little cost, to United Way communities in 2016. UWRA runs annual fundraising and endowment campaigns to assist in funding these programs, providing the communication tools such as UPDATES and the website, and covering administrative costs. UWRA 2016 expenses totaled approximately \$182,000.

Source of UWRA 2016 Funding



- State & Local United Ways
- UWW - Grant/In-Kind Services
- Member Contributions & Leadership Gifts
- Member Dues (\$25 annually)
- Mutual of America grant/Advertisements
- Endowment Income

WHY BE A UWRA MEMBER

It is an opportunity to
STAY UNITED!! Still
working? It is not too
early to Join!

Benefits of Individual Membership Include:

The UWRA website www.UWRA.org provides information about the various services for members and for United Ways. This portion www.uwra.org/services-individual-members in particular lists some benefits of individual membership such as:

- ▶ **Volunteer Opportunities** through participation in UWRA programs which leverage our members experience and expertise to assist the United Way network and ones that help keep connections alive.
- ▶ **Retirement Planning Information** - Webinars, publications, helpful links, and other information posted on the website (www.UWRA.org) and more to come.
- ▶ **Notification of paid interim positions and volunteer needs** in the United Way network
- ▶ **Forums for members to express their issues and concerns** and stay in touch with each other and the United Way field – through the **annual gatherings, UWRA listserv** and **website** (www.UWRA.org), **UWOnline** Retirees and Alumni Community of Practice (UWRA membership is the only way former UW staff have access), **quarterly publication** (UPDATES), **UWRAConnect Facebook Group**, & **Webinars**.
- ▶ **Free discount prescription drug cards** – Outlook card sent to all members and a downloadable FamilyWize at www.UWRA.org.
- ▶ **Access to discount products (e.g., dental plan, vision plan, pet insurance) at group rates.** Please go to website to view and get more information about the benefit programs available to UWRA members.
- ▶ **A Charitable Gift Annuity Program** providing a means to receive attractive annuity payments and leave a lasting legacy to UWRA through the UWRA Endowment Fund. Benefits of a gift annuity include a charitable deduction, tax savings and bypass of capital gains tax for appreciated property.
- ▶ **United Way Car Discounts** – available to all current and former staff: *The Ford Motor Company's Partner Recognition Program* and *The Chrysler Affiliate Rewards Program*. Details provided on www.UWRA.org.



Some of the Ways the UWRA Service Corps supports the United Way network:

Those who served are still serving...

To learn more about the services UWRA provides to United Ways please go to this portion of our website: www.uwra.org/services-local-united-ways. Particularly if you would like answers to the following types of questions:

- Would you or someone in your organization benefit from coaching?
- Need help with donor conversations?
- Is your United Way trying to figure out how to get an Endowment and Planned Giving Program (EPG) off the ground or strengthening an existing program?
- Need ideas around tapping the boomer/retiree market in your community?
- Would you like information to assist in the arena of Retirement Planning?
- Is your United Way in need of experienced Interim Assistance?
- Would you like to find out more about the rich history of United Way?

THANK YOU!

Volunteer NOW!! – Would you like to help with our efforts? **We have ongoing opportunities to LIVE UNITED through volunteerism, advocacy, and interim positions.** The UWRA Service Corps represents actively engaged volunteers committed to enriching the lives of United Way retirees/ alumni and using their skills to help strengthen communities served by United Way. Membership in UWRA is about tenure in and commitment to the United Way movement and provides an example of system citizenship.

Join UWRA – at www.UWRA.org and fill out the **member interest survey** to indicate how you would like to be involved or contact the UWRA office.

LIVE UNITED

Our success would not be possible without the caring people who have chosen to LIVE UNITED with us. We could not provide the level of support that we do for retirees/alumni and local United Ways without the help and support of our members, partners, sponsors and our volunteers who freely give their time to help advance the common good.

Thank you to the United Way Campaign Team who assisted our 2016 annual fundraising efforts!!



ELISE BUIK
President and CEO
United Way of
Greater Los Angeles,
Los Angeles CA



JAMES BROWN
President and CEO
United Way of
Tompkins County
Ithaca NY



BONNIE DUNCAN
President and CEO
United Way of
Hunterdon County
Flemington, NJ



JIM COOPER
President and CEO
United Ways of the
Pacific Northwest
Olympia WA

We truly appreciate the individual and organizational supporters listed on the following pages – we could not do it without you! An investment in the future of UWRA helps to insure that this organization continues to be an active part of the total United Way network and a benefit to current/future retirees. The UWRA Board, Staff and CEO Campaign Team

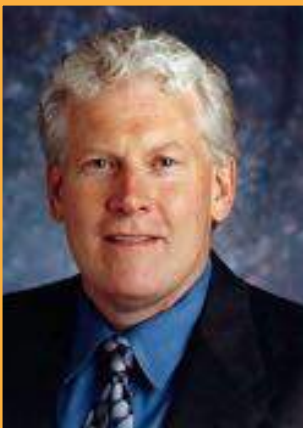
Please Note - All of our contributors are important to us. Although we do our best to keep our lists up to date, some errors or omissions may occur. If your name or organization is misspelled, incorrectly listed, or missing please accept our apologies and bring the mistake to our attention so that we may correct our records. Thank you!

BIG THANKS to our partners and supporters!!

It has been an exciting year of accomplishments for UWRA and we could not have done it without your help! Please accept our sincere thanks for the role you have played in our accomplishments by generously sharing your time, your resources, and/or your voice. You are the heart of UWRA!!

A BIG THANKS to our partner *United Way Worldwide*. UWRA and United Way Worldwide engage in ongoing collaborative activities; and United Way Worldwide provides an annual \$25,000 grant as well as generous in-kind services and support - without which our capacity to provide programs of benefit to our members and the United Way network would be diminished. A sincere thank you to Brian Gallagher for your continued support of UWRA's work!

Thank you UWW staff! The UWRA Board and staff would also like to give a shout out to the United Way Worldwide staff for their assistance and collaboration. Ranging from groups like Investor Relations where we partner to assist the network with Endowment and Planned Giving program development; to Talent where we are joining forces on a Mentoring Initiative for new CEOs; to Finance who helps with our accounting needs; to Creative Studio who makes our products like our Annual Report look terrific; to the print shop and mailroom which helps us with our extensive production and mailing needs (e.g., Updates, Annual Report, Campaign) – across the board the help and cooperative approach is very appreciated, and it increases our capacity to provide programs of benefit to our members and the United Way network. We look forward to continuing partnership opportunities as we seek to fulfill our mission by assisting United Way organizations and their current and former staff.



Thank you Bob Berdelle! And a very special thanks to Bob Berdelle (EVP/CFO United Way Worldwide) who, as the United Way Worldwide (UWW) liaison to UWRA, has worked in various ways to preserve and strengthen the collaborative relationship. A liaison has been appointed since UWRA began in 1989, and this practice in addition to the UWRA Board Chair being an Ex-Officio member of the National Professional Council serves to deepen the partnership and collaborative activities with UWW and the network. After almost eight years as UWW's Chief Financial Officer and 13 years within the United Way network, Bob retired in January 2017. We wish Bob the best and sincerely thank him for his commitment to United Way and his support of UWRA – as liaison, lending the services of the UWW finance department, UWRA Webinar presenter, and as a personal UWRA Leadership Giving Circle member. **THANK YOU BOB!!**



Thank you Jim Yu! Jim Yu has helped numerous United Ways to innovative solutions through the Design Thinking creative problem solving/idea generation/testing process. The Mobile Innovations Lab is a facilitated session that is collaborative, engaging, entrepreneurial, fast-paced, intense and interactive to inspire implementable ideas! UWRA wants to extend a big thanks to Jim for lending his expertise to the UWRA Board and staff to help harness the power of the design thinking approach to help frame a Redesigning the Membership effort and involve stakeholders on the path to unveiling new possibilities and innovative ways UWRA can meet current and future members' needs and desires.



Lovell Mosely, Vice-Chair Membership, shares his ideas with the UWRA Board.



Thank you Mutual of America! Renee Shew, Vice President Mutual of America met with UWRA President and CEO Tricia Smith to deliver a 2016 check in support of UWRA's work. Mutual of America has been a generous supporter of UWRA since the inception of the organization more than 25 years ago; and their annual \$5,000 contribution is an important part of ensuring UWRA's program continuity and growth. Their ongoing commitment to UWRA is very valued and appreciated.
THANK YOU MUTUAL OF AMERICA!!



Renee Shew, shown with **UWRA Board Chair Mike McLarney** joined the Board at the April meeting for a discussion highlighting some available Mutual of America website resources and tools that may help bring additional awareness to aspects around planning for and living in retirement.

Gold Standard United Ways - helping United Way alumni stay connected!

UWRA would also like to extend a special thanks to our **Gold Standard United Ways**. In addition to a contribution to UWRA's annual campaign, another great way to support UWRA is by joining the **Gold Standard United Ways** listed below by sponsoring alumni/retirees' annual dues (\$25) in UWRA, or at a minimum their first year.

UWRA's Gold Standard United Ways

United Way Worldwide –
Alexandria, VA

AFL-CIO Community Services –
Alexandria, VA

United Way of Central Alabama -
Birmingham, AL

United Way of the Bay Area -
San Francisco, CA

United Way of Central Indiana -
Indianapolis, IN

United Way of Greater Lafayette & Tippecanoe County - Lafayette, IN

United Way of the Bluegrass -
Lexington, KY

Metro United Way, Inc. -
Louisville, KY

United Way of Acadiana -
Lafayette, LA

United Way of Southeast Louisiana -
New Orleans, LA

United Way of Massachusetts Bay and Merrimack Valley - Boston, MA

Greater Twin Cities United Way -
Minneapolis, MN

United Way of Greater St Louis -
St Louis, MO

United Way of Lincoln & Lancaster County - Lincoln, NE

United Way of Tompkins County -
Ithaca, NY

United Way of Greater Rochester -
Rochester, NY

United Way of Greater Cincinnati -
Cincinnati, OH

United Way of Greater Cleveland -
Cleveland, OH

United Way of Greater Toledo -
Toledo, OH

United Way of Greater Philadelphia and Southern NJ - Philadelphia, PA

Trident United Way -
North Charleston, SC

United Way of Southern Cameron County - Brownsville, TX

United Way of Tarrant County -
Fort Worth, TX

United Way of Greater Milwaukee -
Milwaukee, WI

Letting future and current alumni/retirees know about our services not only benefits individuals but taps additional volunteers who funnel their knowledge and expertise back into the United Way network. Our dedicated Service Corps continues to serve the movement – becoming a Gold Standard United Way can help us expand our membership/volunteer base! Together, we can make communities a better place for people to live and work. Thank you all for your support!

UWRA LEADERSHIP GIVING CIRCLE

INDIVIDUAL GIFT OF \$100 PLUS IN 2016 (received as of December 31, 2016)

A gift of \$100 or more qualifies you as a member of the UWRA Leadership Giving Circle. UWRA leadership supporters know what it means to LIVE UNITED – many of you not only give generously to UWRA but have been loyal contributors to UWRA and the United Way movement for many years. **Thank you to all of our members and special thanks to our leadership giving circle!!**

\$1,000-\$2,499

Calvin E. Green
Donald Morgan
Carl Zapora

Roger Frick
W. James Greene
Frank Hagel and
Marcia Walker
Teresa Hall Bartels

Bud Biscardo
Kerry Blume
Eugene Blyther
Eleanor Brilliant
Jack Brooks

John H. Garber, Jr.
John G. Geist
Patricia Gobble
Fekete
Mark Graham

David Orrell
David and Susan
Paradine
Edmund Parker
James and Janet

\$500-\$999

Leo and Mary Ellen
Cornelius
Susan B. Dunn
Denise Durel
Susan Gilmore
Ralph Gregory
Ed John and Joyce
Wilbur

Bernard J. Hyman
Mildred S. Keays
H. Allen Larsen
David and Margie
Lee
Myron Liner
Debbie Mason
William McCullough
William Mills

James Brown
Robert H. Brown
Don Buck
Larry Burdett
Aletha Burge
Warren Burt
Kay Burtzloff
Mike Cabat
Edmond Campbell

Ted Granger
Dale Gray
Mike Green
Susan Hager
Sharon G. Hamilton
Patrick J. Hanrahan
Brian T. Hassett
Winifred Helton
Tom Hendry

Pearce
Joseph Pearson
Douglas D. Perkins
Barbara Pingrey
John and Nancy
Provance
Judy Quinlan
Rob Rains
Robert C.

Merritt Johnson
John Kuropchak
Barb and Tom Laing
Dan and Hanna
MacDonald
Michael McLarney
Dennis J. Murphy
Don and Mary
Sanders

H. Lovell Mosely
Edward O'Brien
Richard O'Brien
Sarah Smith Orr
Nancy Perry
Beverly Prueter
Glenn Richter
Ed Rivera
William

Joseph Capita
Viney Polite
Chandler
Salvatore Cina
W. Sloan Coats
Bonnie Cole
Jack and Merle
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Howard Cotner

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Ray Jacoby
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Jan Jokisch
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Doug Rowand
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Edward and Jenifer
Schoenberger
David M. Smith
Lynda Smith

Tricia and Brian
Smith
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Drs. Madeleine and
Doug Warns
Carole M. Watson

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Richard Covey
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John DiCesare
Paul Didier

Michael Kint
Sharon Kish
Beth Ferri Knowles
Bob Kulinski
Ben Landers
Toni Lanford-
Ferguson
Dave Lawrence
Carlos E. Lee

Ernest J. Strobel
Russy Sumariwalla
Sue Suter
James Taylor
Michael Thompson
Joseph Valentine
Dirk Van Den Bosch
Lyanne L.

\$250-\$499

Edward Allard
Deborah Allsop
Susan White Arnett
Anna M. Babin
Bob Berdelle
Gene and Lois
Berres
Judith Tieman Bird
Tom Brown
Robert & Sharron
Cornelius
E. Vincent Crawford
Gary Dollar
Ron Drago
Monica Estabrooke
Winston Faircloth

\$100-\$249

Anonymous
Dick Aft
Deborah Ally
Robert (Bob)
Anthony
Carol Aquino
Alice M. Azure
Elizabeth Baier
Deborah Bayle
Bob Beggan
Gerald T. (Jerry)
Beggs
K. Michael Benz
Merle Berke-
Schlessel

Ralph DiSanto
Dawson Dowty
Daniel Dunne
Michael K. Durkin
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Barbara Edmond
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Anthony Folcarelli
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Tish McCutchen
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William B. McQueen
Henry Monaco
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Christopher Nelson
Tom Nunan
Elizabeth "Biz"
O'Mara

Wassermann
Beverly Weber
Douglas Weber
George W.
Wilkinson
Anne Wilson
Roger Wood
Robert J. Woods

UWRA CELEBRATES LOYAL MEMBERS

The United Way Retirees Association wants to acknowledge our **LOYAL MEMBERS**. We are honoring those people who have the longevity of UWRA membership. Our success would not be possible without those who have chosen to LIVE UNITED with us. The continuing support, encouragement, and talents of the people (both former and current employees) who helped make the United Way network what it is today provide the backbone behind our work, growth and accomplishments; and the UWRA Board and Staff would like to express sincere appreciation for your confidence and loyalty. (List as of 12-31-2016)

MEMBERS SINCE THE BEGINNING...

Robert Anthony
John Garber
W. James Greene
H. Allen Larsen

25 YEAR MEMBERS...

Robert Chandler
Ralph DiSanto
Calvin Green
Mildred Keeyes
Daphne Lamb
Anna Rita Moroni
Richard O'Brien
Isadore Seeman
Claude Townsend

20 to 24 YEAR MEMBERS...

Richard Aft
Adeles Beer
Gerald Beggs
Eugene Berres
Donald Buck
Irene Burnett
Warren Burt
Robert Carr
Salvatore Cina
Lettie May Clawson
W. Sloan Coats
Roger Congdon
Alan Cooper
Leo Cornelius
Jack Costello
Howard Cotner
Richard Covey
Joel Davis
Wayne Davis
Dawson Dowty
Mary Jo Favata
Marietta Floyd
Richard Fusco
Dale Gray
Winifred Helton
Donald Hosford
Anne Hunt
Bernard Hyman
Jerry Jirik
Jerald Johnson
Merritt Johnson

Donald Jordan
Frank Karr
Kenneth Kemerling
J. Thomas Laing
Carlos E. Lee
Myron Liner
John McCormick
William McCullough
William McQueen
Julie Mercer
Ted Moore
Dennis Murphy
Thomas Murphy
Robert Noble
Edward O'Brien
Sarah Orr
David Orrell
Arthur Redding
Charles Reynolds
Donald Sanders
Thomas Sullivan
Russy Sumariwalla
Anita Terranova
Michael Thompson
Thomas Vais
Billie Watts
George Wilkinson
Norma B. (Duel)
Winner
Harvey Yarbrough

15 to 19 YEAR MEMBERS...

Lynn Anderson
William Baker
Jacquelynne Bates
Robert Beggan
Guy Benson
Jordan Biscardo
John Blair
Eugene Blyther
James Bourque
Erich Briggs
Eleanor Brilliant
Jack Brooks
Tom Brown
Gerald Callahan
John Carey
Fred Cerny
Viney Chandler
Doris Clark
John Clark
Bonnie Cole

Mary Steele Collins
Bobbie Creque
Donald Custis
John DiCesare
Mary Emeott
Robert Fleischer
Mary Fogarty
Anthony Folcarelli
Linda Forbes
Roger Frick
Charles Galupi
John Geist
Sharon Hamilton
John Heins
Shirley Hill
Bette Hoffman
Martha Hughes
Mike Hughes
Janet Iden
Rudolph Jackson
Marilyn Jacobs
Lois Jandernoa
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Rosa O'Neal
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Alzora Pitts
Jerry Powell
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Sandra Rupp

William Schaeffler
Martin Scherr
Patricia Schirtz
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Schwanekamp
James Settle
Donna Shea
Ron Spillane
Estelle Spillman
Mary Staples
Kenneth Strzalka
Ernest Strobel
Jim Sullivan
Alice Thacker
Ruth Ellen Trotter
Dirk Van Den Bosch
Patti Anne Vassia
Lyanne
Wassermann
Garth Winckler
Wanda Young

10 to 14 YEAR MEMBERS...

Edward Allard, III
Margaret Anderson
Carol Aquino
Linda Avedon
Alice Azure
Elizabeth Baier
Janet Bates
Nancy Biernbaum
Pedro Blanco
Larry Burdett
Kay Burtzloff
Joseph Calabrese
Kathleen Coan
Barbara Cronin
Marilyn Donnellan
Susan Dunn
Barbara Edmond
John Eman
Monica Estabrooke
Robert Ferriday III
Dolores Ford
Deborah Foster
Anna Gines
Pat Gobble Fekete
Bob Gragson
Ted Granger
Bonnie Grant
Mike Green
Ralph Gregory

Helen Hemmes
Mary Hummel
Ray Jacoby
Larry Johnson
Barbara (Perry)
Kaplinsky
Suzanne Kelley
Diana Kelly
Robert Kulinski
John Kuropchak
Sue Lawrence
David Lee
Bertha Lewis
Bill Link
Walter Masal
Nancy Mason
Vickie Maurer
Beth Maze
Allan McCobb
Donald McKee
Michael McLarney
Sherry McTyeire
H. Lovell Mosely
Christopher Nelson
Jo Nelson
Fred Newman
Wayne Niles
Charles Page
Louis Pascek
Janet Pearce
Joseph Pearson
Nancy Perry
John Provance
Judy Ranieri
Robert Reifsnyder
Mrs. Vito Rigillo
Bill Robinson
Rene Rocamora
Amanda Rosenberg
Juliet Rowland
Robert Sauers
Joseph Schlangen
Lynda Smith
Patricia Smith
Ken Unzicker
Douglas Warns
Madeleine Warns
Douglas Weber
Robert Woods
Donna Yannuzzi
Carl Zapora

UWRA ORGANIZATIONAL MEMBER SUPPORTERS

Thank you to the local and state United Ways listed below that have contributed to our 2016 annual campaign. We could not do it without you! Our organizational campaign is an important source of income that helps to ensure UWRA continues to be an active part of the total United Way network and a benefit to current and future retirees. Giving to UWRA is a wonderful example of System Citizenship - UWRA may or may not be directly helping your United Way/staff this year or next but we will be assisting local United Ways throughout the country as well as assisting the people who helped make the network what it is today. Thank you all for your support! (List arranged in state alphabetical order):

- AL Anniston – United Way of East Central Alabama
- AL Birmingham – United Way of Central Alabama
- AL Mobile – United Way of Southwest Alabama
- AL Montgomery – River Region United Way
- AL Tuscaloosa – United Way of West Alabama, Inc.
- AR North Little Rock – Heart of Arkansas United Way
- AZ Tucson – United Way of Tucson and Southern Arizona
- CA Camarillo – United Way of Ventura County
- CA Corona – Corona-Norco United Way
- CA Irvine – Orange County United Way
- CA Los Angeles – United Way of Greater Los Angeles
- CA Monterey – United Way Monterey County
- CA San Diego – United Way of San Diego County
- CA San Francisco – United Way of the Bay Area
- CA Santa Barbara – United Way of Santa Barbara County
- CO Boulder – Foothills United Way
- CO Denver – Mile High United Way
- CO Fort Collins – United Way of Larimer County, Inc.
- CT Gales Ferry – United Way of Southeastern Connecticut
- CT Hartford – UW of Central & Northeastern Connecticut
- CT New Haven – United Way of Greater New Haven, Inc.
- DE Wilmington – United Way of Delaware, Inc.
- FL Cocoa – United Way of Brevard County
- FL Fort Lauderdale – United Way of Broward County
- FL Fort Pierce – United Way of St. Lucie County
- FL Gainesville – United Way of North Central Florida
- FL Highland City – United Way of Central Florida
- FL Jacksonville - United Way of Northeast Florida, Inc.
- FL Miami – United Way of Miami-Dade
- FL Orlando – Heart of Florida United Way
- FL Palm Beach – Town of Palm Beach United Way
- FL Panama City – United Way of Northwest Florida
- FL Port Charlotte – United Way of Charlotte County
- FL St. Augustine – United Way of St Johns County, Inc.
- FL Tampa – United Way Suncoast (Tampa Bay Area)
- FL Vero Beach – United Way of Indian River County
- GA Athens – United Way of Northeast Georgia
- GA Atlanta – United Way of Greater Atlanta
- GA Augusta – United Way of the Central Savannah River Area
- GA Columbus – United Way of the Chattahoochee Valley
- GA Cumming – United Way of Forsyth County
- GA Macon – United Way of Central Georgia
- GA Savannah – United Way of the Coastal Empire
- HI Honolulu – Aloha United Way
- IA Bettendorf – United Way of the Quad Cities Area, Inc.
- IA Des Moines - United Way of Central Iowa
- IA Dubuque – United Way of Dubuque Area Tri-States
- IL Champaign – United Way of Champaign County
- IL Chicago – United Way of Metropolitan Chicago
- IL Gurnee – United Way of Lake County, Inc.
- IL Rockford – United Way of Rock River Valley
- IL Springfield - United Way of Central Illinois
- IN Columbus – United Way of Bartholomew County
- IN Elkhart – United Way of Elkhart County
- IN Griffith – Lake Area United Way
- IN Indianapolis – United Way of Central Indiana
- IN Lafayette – UW of Greater Lafayette & Tippecanoe County
- IN Muncie – United Way of Delaware County
- IN Valparaiso – United Way of Porter County
- KS Hutchinson – United Way of Reno County, Inc.
- KS Topeka – United Way of Greater Topeka
- KS Wichita – United Way of the Plains
- KY Bowling Green – United Way of Southern Kentucky
- KY Lexington – United Way of the Bluegrass
- KY Louisville – Metro United Way
- LA Alexandria – United Way of Central Louisiana
- LA Lafayette – United Way of Acadiana
- LA Lake Charles – United Way of Southwest Louisiana
- LA New Orleans – United Way of Southeast Louisiana
- MA Boston – UW of Massachusetts Bay & Merrimack Valley
- MA Brockton – United Way of Greater Plymouth County
- MA Fall River – United Way of Greater Fall River
- MA Fitchburg – United Way of North Central Mass.
- MA Springfield – United Way of Pioneer Valley
- MA Worcester – United Way of Central Massachusetts
- MD Salisbury – United Way of the Lower Eastern Shore
- ME Augusta – United Way of Kennebec Valley
- ME Bangor – United Way of Eastern Maine
- ME Portland – United Way of Greater Portland
- MI Ann Arbor – United Way of Washtenaw County
- MI Detroit – United Way for Southeastern Michigan
- MI Flint – United Way of Genesee County
- MI Grand Rapids – Heart of West Michigan United Way
- MI Kalamazoo – UW of the Battle Creek & Kalamazoo Region
- MI Lansing – Capital Area United Way
- MI Muskegon – United Way of the Lakeshore
- MI Plymouth – Plymouth Community United Way
- MI Port Huron – United Way of St Clair County
- MN Minneapolis – Greater Twin Cities United Way
- MO Kansas City – United Way of Greater Kansas City
- MO St. Louis – United Way of Greater St. Louis
- MT Missoula – United Way of Missoula County
- NC Fayetteville – United Way of Cumberland County
- NC Rocky Mount – United Way Tar River Region
- NC Wilmington – United Way of the Cape Fear Area
- NC Winston-Salem – United Way of Forsyth County
- ND Grand Forks – UW of Grand Forks, E Grand Forks & Area
- NE Grand Island – Heartland United Way
- NE Lincoln – United Way of Lincoln & Lancaster County
- NE Omaha – United Way of the Midlands
- NJ Farmingdale – United Way of Monmouth County

THANK YOU

NJ Flemington – United Way of Hunterdon County
NJ Lawrenceville – United Way of Greater Mercer County
NJ Milltown – United Way of Central Jersey, Inc.
NJ Morristown – United Way of Northern New Jersey
NJ Paramus – United Way of Bergen County
NV Reno – United Way of Northern Nevada and the Sierra
NY Albany – United Way of the Greater Capital Region
NY Ithaca – United Way of Tompkins County
NY New York City – United Way of New York City
NY Rochester – United Way of Greater Rochester
NY Utica – United Way of the Valley & Greater Utica
NY White Plains - United Way of Westchester and Putnam, Inc.
OH Canton – United Way of Greater Stark County
OH Cincinnati – United Way of Greater Cincinnati
OH Cleveland – United Way of Greater Cleveland
OH Columbus – United Way of Central Ohio
OH Lancaster – United Way of Fairfield County
OH Lebanon – United Way of Warren County Ohio
OH Lima – United Way of Greater Lima, Inc.
OH Newark – United Way of Licking County
OH Toledo – United Way of Greater Toledo
OK Oklahoma City – United Way of Central Oklahoma
OK Tulsa – Tulsa Area United Way
PA Allentown – United Way of the Greater Lehigh Valley
PA Enola – United Way of the Capital Region
PA Erie – United Way of Erie County
PA Lancaster – United Way of Lancaster County
PA Philadelphia – UW of Greater Philadelphia & Southern NJ
PA Reading – United Way of Berks County
PA York – United Way of York County
RI Providence – United Way of Rhode Island
SC Anderson – United Way of Anderson County
SC Beaufort – United Way of the Lowcountry, Inc.
SC Greenville – United Way of Greenville County
SC North Charleston – Trident United Way
TN Chattanooga – United Way of Greater Chattanooga
TN Cleveland – United Way of Bradley County
TN Franklin – United Way of Williamson County
TN Jackson – United Way of West Tennessee, Inc.
TN Kingsport – United Way of Greater Kingsport
TN Knoxville – United Way of Greater Knoxville
TN Memphis – United Way of the Mid South
TN Nashville – United Way of Metropolitan Nashville
TX Amarillo – United Way of Amarillo & Canyon
TX Angleton – United Way of Brazoria County
TX Baytown – UW of Greater Baytown Area/ Chambers Cty
TX Dallas – United Way of Metropolitan Dallas, Inc.
TX Denton – United Way of Denton County, Inc.
TX El Paso – United Way of El Paso County
TX Fort Worth – United Way of Tarrant County
TX Houston – United Way of Greater Houston
TX Laredo – United Way of Laredo, Inc.
TX Lubbock – Lubbock Area United Way, Inc.
TX McAllen – United Way of South Texas
TX Port Arthur – UW of Mid & South Jefferson County
TX San Antonio – UW of San Antonio & Bexar County
TX Wichita Falls – North Texas Area United Way
UT Provo – United Way of Central & Southern Utah
UT Salt Lake City – United Way of Salt Lake
VA Fredericksburg – Rappahannock United Way
VA Norfolk – United Way of South Hampton Roads
VA Richmond – UW of Greater Richmond & Petersburg
VA Roanoke – United Way of Roanoke Valley, Inc.
VA Vienna - United Way of the National Capital Area
WA Everett – United Way of Snohomish County
WA Tacoma – United Way of Pierce County
WA Wenatchee – United Way of Chelan & Douglas Counties
WI Madison – United Way of Dane County
WI Menasha – United Way Fox Cities
WI Milwaukee – UW Greater Milwaukee & Waukesha County
WI Racine – United Way of Racine County
WI Stevens City – United Way of Portage County
WI West Bend – United Way of Washington County
WV Charleston – United Way of Central West Virginia

Thank you to the state United Ways listed below that have contributed to date to our 2016 annual campaign. We could not do it without you!

FL Tallahassee – United Way of Florida, Inc.
GA Macon – United Ways of Georgia Assn
IN Indianapolis – Indiana Association of United Ways
KY Louisville – United Way of Kentucky
MI Lansing – Michigan Association of United Ways
MN Minneapolis – United Ways of Minnesota
OH Columbus – Ohio United Way
SC Columbia – United Way Association of South Carolina
TX Austin – United Ways of Texas
WA Olympia – United Ways of the Pacific Northwest
WI Madison – United Way of Wisconsin

UWRA Endowment Fund Contributors

Thank you! A Big Thanks to our Endowment Contributors! The endowment furthers the mission of UWRA by providing long-term growth and stability not possible from other sources so that the organization can be more impactful.

Income: Approximately \$8,765 in spreadable income was generated in 2016 from the funds. The 2016 end of year balance of the funds totaled nearly \$190,000 with an additional \$160,000 in expectancies.

Uses: Endowment income has been targeted to our organizational priorities and our Endowment contributors have enabled us to execute in a broader way on our mission. To date Endowment monies have supported our retirement initiative, the mentoring program, new product development, and staff training. Building the Endowment would help the organization be more impactful by:

- Harnessing the experience, skill, and expertise of our retirees and alumni to better serve local United Ways and our communities
- Connecting alumni and retirees with each other enriching their lives and their retirement
- Providing programs and services to enhance the lives of United Way retirees and future retirees
- Furthering the values and traditions of the United Way movement

UWRA Endowment Named Funds (Contribution of \$10,000+)

Dick and Mary Lu Aft

Tom and Carol Brown

Alan and Selma Cooper

Bold represents Legacy Circle Members (gift \$1,000 plus)

UWRA Endowment Contributors after the Founding Period

Dan and Kathleen Dunne
Ralph & Mary Anne Gregory
Sharon G. Hamilton

Mike and Barbara Hughes
David & Margie Lee

Michael J. McLarney
Carl Zapora

UWRA Endowment Founders (2 anonymous contributors)

Dick & Mary Lu Aft
Stephen Beer
Eugene & Lois Berres
Brian & Mary Bowden
Eleanor L. Brilliant
Tom & Carol Brown
Irene H. Burnett
Joseph & Mary Calabrese
Viney Polite Chandler
Chelsey I. Cochran
James Colville
Alan & Selma Cooper
Leo & Mary Ellen Cornelius
Merle & Jack Costello
Martin B. Covitz
Donald D. & W. Rebecca Custis
Wayne R. Davis
Charles & Ruth Devine
Pat Gobble Fekete
Toni Lanford Ferguson
Anthony & Diane Folcarelli
Mary-Elizabeth Ford
Brian A. Gallagher

John Garber
Elizabeth & Tom Gower
Mr. & Mrs. Joseph J. Guise, Jr.
Joe Haggerty
Charles E. Heiden
Dorothea Heiden
Winifred Helton
Mack & Sarah Hixon
Bernard & Patricia Hyman
Beth Ferri Knowles
Tom Laing
H. Allen Larsen
Irving & Helenann Lauber
Myron & Charlotte Liner
William S. Link
Dan MacDonald
Janet (Obeid) Macidull
W. Leon Matthews
Connie & John McCormick
Henry Monaco
Ted Moore
Don & Rita Morgan
Jannet C. Morgan

Dennis J. Murphy
Mark & Mitzi O'Connell
Sunshine J. Overkamp
George J. Pfeiffer
Wanda B. & Rodney S. Phibbs
George & Gretchen Rice
Vito Rigillo (in memorium)
Juliet Coles Rowland
Mary & Don Sanders
William A. Schaeffler
William Schwankamp
Patricia & Brian Smith
Ron & Rose Spillane
Russy D. Sumariwalla
Alice S. Thacker
Mike & Guy Thompson Families Fund
Raymond Unk
Thomas T. Vais
Joseph W. Valentine
Larry Walton
Lyanne L. Wassermann
George Wilkinson
Henry Zimmer

THANK YOU

THE UWRA BOARD AND STAFF THANK YOU FOR YOUR SUPPORT!

2016 UWRA Board of Directors

EXECUTIVE COMMITTEE

Mike McLarney: *Board Chair*
Ralph Gregory: *Board Chair-Elect /Chair Retirement Planning Committee*
Tom Brown: *Past Board Chair/Chair Nominating Committee*
Carole Watson: *Secretary*
Carl Zapora: *Treasurer*
Susan Gilmore: *Vice-Chair Resource Development*
Ed John: *Vice-Chair Program Development*
Lovell Mosely: *Vice-Chair Membership*

BOARD MEMBERS

Dick Aft: *Chair Endowment Committee*
Judy Quinlan: *UPDATES Newsletter Editor*
Gary Dollar
Susan Dunn
Roger Frick
Sharon Hamilton
David Lee
Bill Mills

United Way Worldwide liaison to UWRA



2016: Bob Berdelle, EVP/CFO United Way Worldwide. UWRA extends appreciation and best wishes to Bob on his retirement.



2017 Brian J.G. Lachance, Esq., Chief of Staff United Way Worldwide. UWRA welcomes and thanks Brian as the 2017 UWW liaison to UWRA.

The Board and staff would like to extend a **THANK YOU** to:

- **Tom Brown**, as he rotates off the Board, for his time, commitment and support of UWRA. Through the years Tom has worn many hats and we are grateful for all his efforts on behalf of our association including his leadership as Board Chair. We welcome his continued participation, as a key volunteer helping United Ways develop or strengthen their Endowment and Planned Giving programs.
- **Sharon Hamilton and Gary Dollar** for their willingness to serve in order to help us assure UWRA's continued growth and service to members and the United Way network. Both Sharon and Gary had personal commitments that necessitated resigning from the Board; and while their service was shortened, their contributions have been very valued and will be missed.
- **Susan Dunn** for stepping in mid-year to serve on the Board in order to fill a vacancy due to an unexpired term, and for accepting the invite to be the 2017 Vice-Chair of Resource Development.
- **Joe Tolan and Deborah Bayle** for accepting the invite to join the 2017 Board.

2016 Staff

Patricia R. Smith, UWRA President and CEO
tricia.smith@unitedway.org, 703-836-7112, ext. 624

Deborah Casselbury – Campaign Associate
Deborah.casselbury@unitedway.org, 703-836-7112, ext. 625



THANK YOU

JOIN UWRA!

An organization of United Way current professionals, alumni, & retirees
Still working? Not too early to join!!

Connections, Fun, and Making a Difference



UWRA – THE WAY TO STAY UNITED

*Making A Difference: Those who served are still serving
Making Connections: Communication...connection...camaraderie...*

Inviting United Way current & former staff to stay connected and involved!

- stay connected with colleagues and united way
- maintain and enhance your relationships
- use your experience and expertise to help others
- transmit knowledge to future generations
- keep abreast of united way volunteer and interim staff opportunities
- connect with resources that can help with united way operations
- connect with resources/lessons learned that can assist with planning for a quality retirement

FOR MORE INFO:



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www.UWRA.org



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703-836-7100 x625



EMAIL:
UWRA@unitedway.org



FACEBOOK:
UWRACONNECT



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