



UPDATES

Issue 3, 2018

UWRA AWARDED MAJOR GRANT TO CONDUCT ASSESSMENT TO ADVANCE 'AGING IN PLACE' BEST PRACTICES

On November 13, 2018, representatives of United Way Worldwide and United Way Retirees Association signed an agreement granting UWRA a disbursement of restricted funds from the Cinda A. Hallman Memorial Fund, established to fulfill Ms. Hallman's commitment to a legacy of assisting older people to remain in their homes. The grant will be used by UWRA to conduct an assessment to review 'aging in place' best practices and to identify initiatives with a track record of success that could be expanded to a national audience through the United Way network.

Cinda A. Hallman was the former chief executive of Fort-Lauderdale-based Spherion Corp (2001 to 2004) and a former member of United Way of America's Board of Trustees

(2001 to 2007). She had a reputation for brilliance and has been described as 'very analytical,' and 'a visionary, especially in the field of information technology.'

Earlier this year, Ken Euwema, UWW Controller and a UWRA member, acknowledged to UWRA's CEO, Amber Kelleher, "There are natural synergies between the scope of Ms. Hallman's intentions and UWRA's work with older adults." Ed John, UWW's former Vice President of Planned Giving and a current UWRA Board member, presented a proposal to the UWRA Board during their April 2018 Board meeting and subsequently received unanimous support to pursue a grant from the Cinda A. Hallman Memorial Fund.

The assessment conducted by UWRA will identify key factors contributing to an older adult's ability to successfully 'age in place.' UWRA will engage a broad base of relevant stakeholders (e.g., local United Ways, key UWW staff, Retire United affinity groups, agencies, and subject matter experts) to evaluate current offerings and to identify scalable program and service opportunities for the network. The 6-month project will culminate in a report outlining recommendations for priority projects.

According to a statement by Brian Lachance, Chief of Staff for UWW and the UWW liaison to UWRA, "UWRA's latest collaboration with

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the United Way network is a great way to spotlight and lift up the important work we do in serving older adults. It's a perfect match to our shared hopes for a good life for every person in every community."

A key outcome of the needs assessment is expected to be a renewed focus on the Cinda Hallman Center for Aging Adults as a channel for providing member United Ways serving older adults with access to specialized training, conferences, and national experts to share best practices and strategies.



From L To R: Susan Dunn (Vice Chair of Resource Development, UWRA), Amber Kelleher (CEO, UWRA), Ralph Gregory (Board Chair, UWRA), Ken Euwema (VP/Controller, United Way Worldwide), Ed John (Vice Chair of Programs, UWRA)



Chairman's Corner

by Ralph Gregory

2018

Someone once said that retirement is the transition from Who's Who to Who's S/he.

Many of us may believe that there is some truth to this observation. But over the past two years, as I have had the honor to serve as Board Chair of UWRA as well as interim president & CEO during the last several months of 2017, I have had the opportunity to talk to a good many of you. And I have come away from each conversation increasingly convinced that the "who's s/he" label just doesn't fit any of us.

As individual members, many of you have shared that you certainly have not been forgotten – that you continue to be in great demand in your communities as members of local boards, as consultants, and in so many other ways. And you have also voiced a continuing commitment to United Way and a desire to continue to serve in various ways through UWRA. Although most of us may no longer carry formal United Way responsibilities, our leadership skills, our ability to build relationships, and our understanding of community have not diminished.

Equally important, many of you who are in leadership positions within the United Way network today have told me that you value the qualities that our individual members can bring when your organizations need some form of assistance. As organizational members of UWRA, your local United Ways know that there is a place where you can turn when experienced consultation, interim staffing, and other kinds of help are needed.

You know that you will get individuals who understand that yesterday's solutions may not always address today's challenges, but will bring with them a strong sense of mission as well as strategic problem-solving skills – honed by both successes realized and lessons learned.

For almost thirty years, UWRA has served as that intersection of individual members who want to continue to make a difference and a network of local United Ways that value what individual members can bring as United Way continuously evolves. As I have indicated in past columns, our Board has been working hard to meet the interests and expectations of both UWRA's individual and organizational members. And our Board will continue to do so as I turn the gavel over to Carl Zopora in January.

I have been very fortunate to have worked with a Board during my tenure that, to a person, has really cared about the future of UWRA – and given generously of their time and talent. And I know that all of you will agree that we have found a new president & CEO who is clearly the right person to provide professional leadership during this time of challenge and change. Amber Kelleher hit the road running a year ago, is effectively guiding a benchmark-intensive Board strategic initiative, and is exceeding our expectations in every way every day.

We are well-positioned for growth and impact in the years ahead. And our Board and staff look forward to working together with all of you to further strengthen UWRA and the United Way network.

MAKING A DIFFERENCE:

Those who served are still serving...

CEO Mentoring & Coaching

UWRA continued its partnership with UWW's Talent Management team in their re-launch of the Mentor Match platform in November 2018. The rich experience of the UWRA volunteer base offers valuable support to executives as they navigate their responsibilities. UWRA members make up more than one-third of the program's mentors, with numbers growing every week. (Visit <https://unitedway.chronus.com/about> for more information about becoming a mentor.)

Crisis Response Initiative

A small team of UWRA members with direct experience in crisis response and disaster recovery was formed in 2018 to work collaboratively with UWW to assist and support local United Ways in areas devastated by the recent storms. This work will continue into 2019, with on-site placements at designated United Ways. (Email uwra@unitedway.org if you are interested in serving in a similar capacity.)

Endowment and Planned Giving (EPG) Initiative

UWRA's team of pro bono planned giving consultants responded to numerous requests from local United Ways for mentoring and coaching resources to establish and grow their endowment & planned giving programs. UWRA also hosted two planned giving webinars in 2018, as part of a webinar series for smaller United Ways: Planned Giving Baby Steps (September 2018) and How to Talk to

Year in Review



President's Message

by Amber Kelleher

Donors about Planned Giving (November 2018). More than 200+ United Way staff registered for each webinar, reinforcing UWRA's important role in this area. (Email uwra@unitedway.org if you are interested in learning more about becoming a planned giving consultant for UWRA.)

Engaging Boomers/ Retirees Initiative

Advancing the United Way network's engagement of the pre-/retiree market segment is an important focus of UWRA, working in collaboration with United Way Worldwide. UWRA joined a cross-functional task force of UWW staff and United Way professionals to collate relevant resources and disseminate promising practices to the network. In July 2018, UWRA's CEO launched the UW Retire United community on Workplace (<https://unitedway.facebook.com/groups/EngagingRetirees/>) as an additional resource for network conversations.

Interim Staffing Placements

One of the best-known services offered by UWRA is the opportunity to fill United Way interim positions nationwide with UWRA members, who assume these important roles with no learning curve. UWRA worked throughout the year with state and local United Ways to share information about these opportunities to 500+ current and former United Way staff.

Retirement Planning Initiative

UWRA has been engaged in a multi-year effort to encourage and empower current and former United Way staff to take the initiative in planning for their retirement.

...Continued on page 7

What a year! As I reflect on the past eleven months, there is much to celebrate and even more to anticipate.

It has been an absolute pleasure getting to know many of you through our emails, phone conversations, face-to-face encounters, and Workplace by Facebook exchanges. I am inspired every day by the work you did and continue to do to make a difference in your communities. It may seem second nature to you, but there is a whole world out there that has much to learn from you and your commitment to service.

December marks a Board transition for UWRA. People often comment on the caliber of our Board members, and with good reason. It is an incredible group of United Way professionals, led for the past two years by Ralph Gregory. Ralph has been my co-pilot this year, patiently imparting knowledge about the network and truly setting me up for success in my role. I feel incredibly prepared to move forward and welcome a new partnership with incoming Board Chair, Carl Zapora. To our retiring Board members – Lovell Mosely, Judy Quinlan, and Carole Watson – thank you for your service to UWRA. You will be missed, but we won't let you go far. We look forward to welcoming three new Board members in January: Shannon Abitbol, Thelma Garza, and Ed Rivera (page 4).

The 2018 Year in Review (page 2) highlights the notable achievements of UWRA and UWRA members. It also gives you some flavor of our day-to-day work. I am most proud of two accomplishments: our agreement with UWW for the forthcoming grant from the Cinda A. Hallman Memorial Fund (page 1) and our progress to help United Ways engage older adults as advocates, donors, and volunteers. These initiatives strengthen our position as thought leaders in a space that is a natural fit with our member base.

Looking ahead to 2019, there are still opportunities to create and improve specific experiences, benefits, and offerings to fulfill our mission. We also remain committed to expanding our membership base and diversifying our revenue sources to ensure the sustainability of UWRA. You can anticipate more regular and targeted messages from us as we experiment with the right balance of content and engagement for each member. As always, your feedback is welcome.

It is becoming a tradition to close this column by expressing my sincere thanks to each of you for your gracious and ongoing support as we work together to strengthen and sustain this important organization. On behalf of UWRA, I wish you Joy and Peace during the holidays and throughout the New Year.

WELCOME, NEW BOARD MEMBERS

You may recognize UWRA's newest Board members, particularly veterans Thelma Garza and Ed Rivera. We extend a warm welcome back to Shannon Abitbol. Continue reading to learn more about each of them.

Shannon Abitbol



Tell us about your time with United Way.

I was most connected with the United Way of Snohomish County in Everett, Washington. I started as a campaign executive and moved into the position of Donor Relations Manager. I thoroughly enjoyed my role, which involved helping to implement changes to our relationship management program.

After three years of living in Washington, my husband – who was in the Navy - received orders to move to California. I had the opportunity to continue my relationship management work as an independent consultant for the United Way of Greater Los Angeles.

What or who inspires you?

I am so inspired by caring people who are willing to help others, and I am continually inspired by activists who use their voices for the greater good.

When have you been the most satisfied in your life?

I am the most satisfied when helping others, particularly when I can do so anonymously. There is something magical about being able to give to someone when they aren't expecting it and don't know who you are.

How do you spend your free time?

I spend my free time with my husband and three children. I also love running and frequently run in local races. I love to travel whenever I have the opportunity.

Thelma Garza



Tell us about your time with United Way.

I have been in my current role as President and CEO of United Way of South Texas for 24 years. Prior to that, I worked for nine years for the United Way of the Coastal Bend in Corpus Christi, Texas. McAllen (TX) is a very different region of the country and my time here has been extremely rewarding. There are so many needs. The refugee respite center in our community alone sees about 500 refugees per day.

What or who inspires you?

The people who inspire me are those who have a huge impact on any kind of social justice issue. For example, Abraham Lincoln is an inspiration for abolishing slavery. Maybe we're not making that kind of an impact in our community or region, but we are changing lives and that's what it's all about.

When have you been the most satisfied in your life?

Probably now. I'm at a time in my career and married life when I'm able to look back and see my accomplishments. It's very satisfying.

How do you spend your free time?

I'm always busy, but when I have free time, I like to travel, especially in the US. I enjoy gardening, doing arts and crafts, and decorating my office and my home. Time is so limited, but I try to make time to do those things.

Ed Rivera



Tell us about your time with United Way.

I have served the national United Way movement in numerous capacities. Earlier in my career, I was a Group I Intern with United Way of America. I also held roles with United Way of Metropolitan Chicago (IL), United Way of the Coastal Bend (TX), United Way of Santa Clara County (CA), and Boulder County United Way (CO). I assumed leadership roles with two other organizations in the nonprofit sector before accepting my current role 10 years ago as President and CEO of the United Way of Central New Mexico. I enjoy being involved with members of the New Mexico Association of United Ways, the statewide association.

What or who inspires you?

I'm always inspired by those who live a life of servant leadership, and I've had the pleasure to meet a few in my career.

When have you been the most satisfied in your life?

I've been blessed with a fun and fulfilling career, inside and outside United Way, along with inspirational parents, family, colleagues, and friends.

How do you spend your free time?

I enjoy traveling, hiking, and exploring nature. I also enjoy great dining.

ONE GRANDFATHER'S ATTEMPT TO LEAVE A LEGACY TO HIS GRANDCHILDREN

By Bob Ferriday, Retired CFO, United Way of Greater Milwaukee and Waukesha County, Inc.



Following retirement, and in spite of much volunteering and travel, I have had more time to consider the subject of my mortality and leaving a legacy. My late wife Sally and I were blessed to have seven grandchildren at the time of her passing and since then four more have been added to our side of the family. I should note that I have remarried, and my wife Barbara now has seven grandchildren on her side.

A number of years ago, I decided to attempt to stimulate an interest in the idea of giving back and thinking beyond one's self. I offered a "soft challenge" to the two oldest of my grandchildren, who at the time were in their teens: Select a not for profit charity, through whatever process they decide, take the time to research that organization, (using direct contact if possible, obtaining printed and other materials as available), and prepare for a formal presentation at our annual family Christmas gathering.

I told them that if they agreed to this "challenge," that following their formal report to the family, I would make a meaningful donation to their charity in their name and also give them a small cash thank you for their effort. Both agreed!

I will say that they later told me that the toughest part of the challenge was not the preparation but rather the public speaking aspect, especially because it was to their family, including parents, siblings, cousins, aunts and uncles...a growth opportunity for sure.

Following that first Christmas get-together, I asked the next two oldest to do the same for the next year's holiday. It then became a tradition, at least until we ran out of grandchildren...

What I learned from this legacy "experiment" is that it exceeded my expectations. Fortunately, each grandchild took the challenge in good faith and,

did a commendable job of researching and presenting their chosen charity. They each learned something they hadn't known and realized that there are real needs beyond themselves, and finally, that they are indeed fortunate!

One more item: I have always stressed the importance of saving and the power of compounding interest to my grandchildren. As they are all now earning either a full-time salary or an hourly wage during the summer, I felt there is one more thing I could do to try and leave a legacy. I strongly encouraged setting up a ROTH account and then indicated that I would match up to the first \$500 they contributed each tax year. All have set up a ROTH and all are contributing each year to at least that level. I believe this is the best investment I have ever made!

Best of luck to all retiree grandparents!

NEW MEMBERS

Karen Brunn (Arlington, VA)

Sarah Caruso (Minneapolis, MN)

Ernest Conrad (Seattle, WA)

Mark Furst (Kingsville, MD)

Margaret Ganyo (Chubbuck, ID)

Connie Hodges (Jacksonville, FL)

Frances Melson (New Orleans, LA)

Terry Moran (Kansas City, MO)

Beth Terry (Gretna, LA)

Mark Todd (Yakima, WA)

James van der Klok (Washington, DC)

Alex Young (Sarasota, FL)

UWRA MYSTIC GATHERING: OCTOBER 1-4, 2018

By Rob Reifsnnyder



I retired in May, after 18 years as CEO of United Way of Greater Cincinnati and 43 years in United Way. The work was important, intense, diverse, and the most rewarding I can imagine. As I approached retirement, I received advice from numerous business friends who had made the leap, and who suggested that I needed to “learn to say no” to the potentially-numerous offers of involvement I might receive. Despite this advice, I’ve tended to approach my early retirement days with a “let’s try it” attitude. It was this approach that won the day when I received notice that the annual gathering of United Way retirees and alumni would be held in Mystic Seaport, CT in October. The pot was sweetened when I learned that Joe Tolan, whom I worked with for 14 years and who succeeded me as President of Metro United Way in Louisville, and his wife Terry, also a United Way alum, were attending.

The Gathering was beautifully hosted and organized by my friend Susan Dunn, retired CEO of United Way in Hartford, CT, and her husband Ned – a history buff who supplemented our official tours with great stories gathered from a lifetime of living in the area. The relatively small but very mighty group included Susan and Ned, Joe and Terry, Barb Edmond, Pat and Nicholas Fekete, Bob Ferriday and Barbara McMath, Susan and Ben Gilmore, and Amber Kelleher, our very capable new UWRA Director. While I didn’t realize this going into the trip, the Association, and our group, included United Way alumni who are now working for other organizations, but who consider United Way their primary career.

Gretchen and I preceded the Gathering with a visit with friends in Western MA, where I spent 3 years of my early career as Associate Director of Berkshire United Way. This visit included an enjoyable discussion with current CEO Kristine Hazzard at the Berkshire United

Way office. On Monday, October 1, it was on to Mystic Seaport, where we gathered together at the Mystic Hilton suite for an opening reception before heading out to dinner together. It was fun for my wife Gretchen and me to reconnect with old friends and meet new ones!

Tuesday was our day at the restored Mystic Seaport, where we enjoyed touring the Museum, shipyard and ships, and many restored shops. A highlight was the serenade by one of the shop guides, whose reputation as a Shantyman is widely-known. A reception at the hotel followed, before breaking into several groups for dinner. Gretchen and I had a great chance to catch up with Joe and Terry at Bravo Bravo.

Wednesday featured a fantastic cruise through the waters of New London Harbor, Long Island, Block Island, and Fisher’s Island Sounds, and Gardiner’s Bay. The cruise featured a guided view of a dozen lighthouses scattered throughout. Who knew that lighthouses came in so many shapes and sizes? A reception and group dinner concluded the day.

A personal highlight for me – as a history buff and former English major – was Thursday’s trip to Hartford. Ned guided an informal bus/car tour of Hartford, and we all had wonderful tours of the homes of Mark Twain and Harriet Beecher Stowe. Our Mark Twain tour guide offered a generous sprinkling of Twain quotes, keeping us laughing throughout the tour.

Lunch at Nook Farm featured a discussion with nationally-known career transition consultant Nancy Collamer. Nancy followed up with many of us and wrote a blog on career transitions, recently featured in Forbes, NextAvenue.org, United Way’s Breakfast Online, and page 8 of this newsletter.

Gretchen and I left the Gathering before the final Thursday night dinner and Friday morning breakfast, to visit my brother and sister-in-law in nearby Salisbury, CT. We truly appreciated that the Gathering was well-organized, with events planned for each day; that we didn’t have to participate in each event; but if we did, we still had free time to relax, shop, exercise, or just enjoy the area.

Initially uncertain how we would take to our UWRA Gathering, we found the opportunity to be with old and new friends thoroughly enjoyable, and being in Mystic Seaport and Hartford was icing on the cake. To anyone who has been on the fence about attending a UWRA Gathering, I’d say, join us next year! Come on in, the water’s warm!

We hope to see you in Alexandria in October 2019!

SEP 30-OCT 4

SAVE THE DATE:
2019 UWRA GATHERING

ALEXANDRIA, VA

REMEMBERING FRIENDS



Donald George "Don" Buck

Donald George "Don" Buck, 92, of Las Cruces, NM, passed away on July 25, 2018. LTC Donald G. Buck,

USA (Ret), was born to Dewey and Helen Buck on March 10, 1926 in Oneonta, NY. He enlisted in the Navy in early 1943 and served in many capacities throughout the course of his military career, which lasted until his retirement in 1973. Following

retirement, Don moved his family to Las Cruces and accepted a job as the Program Director for the American Red Cross.

He then became the Executive Director of the United Way of Dona Ana County where he retired again after 20 years in 1994. Of course, "retirement" is a matter of perspective. Don continued to participate on numerous Boards and Committees.

He truly had a heart of service and considered it an absolute privilege to serve his community.



IN MEMORIAM

Please visit the UWRA Memorial Wall at <https://www.uwra.org/acknowledgements> to view a recent list of gifts made to UWRA to honor colleagues, friends, and family from the United Way community

Contact UWRA@unitedway.org for more information about memorial gifts and endowment contributions

Continued from 2018 Year in Review on page 3...

In addition to publications and other helpful resources, UWRA, with support from IBM, produced a webinar series to address significant issues around retirement planning and living in retirement. The series is posted in the Retirees and Alumni Group of United Way Online.

United Way History

UWRA is committed to the appreciation and preservation of United Way history through articles, publications, videos, and more. In 2018, UWW launched the United Way History community on Workplace (<https://unitedway.facebook.com/groups/103030996927739>), where many UWRA members and United Way professionals convene to share institutional knowledge, memorabilia, media clips, and memories.

MAKING CONNECTIONS:

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

Updates

This UWRA Newsletter - published three times each year - was distributed to UWRA

members and all United Ways through a combination of digital media and printed mailings. UWRA members consistently identify Updates as one of the top-rated benefits of UWRA membership.

Gatherings

To foster continued connections, UWRA held its annual Gathering of retirees, alumni and guests in October 2018 in Mystic, Connecticut. Planning is underway for a 2019 Gathering on September 30 to October 4 in Alexandria, Virginia.

LinkedIn Group for United Way Professionals

Administration of an existing LinkedIn group - United Way Professionals and Alumni - was transferred to UWRA in October 2018. The group has been largely inactive in recent months, but its membership of 5000+ current and former United Way professionals represents an expansive audience and additional communication channel to further promote the work of UWRA. (Visit <https://www.linkedin.com/groups/113977/> to request membership to the LinkedIn group.)

Website

During the summer of 2018, UWRA engaged the assistance of an intern from the Washington Internship Institute to update the UWRA website. The refreshed site remains an important vehicle to effectively communicate information and opportunities.

Workplace

UWRA's newest membership benefit is access to Workplace, an online community where current and former United Way staff connect, communicate, and collaborate. Over 100 UWRA members have joined UWRA's member-only online group since its launch in July 2018, and they are quickly discovering a space for building relationships, participating in discussions, and reconnecting with colleagues.

Email uwra@unitedway.org or refer to the cover article in our August newsletter (Issue 2; 2018) for information about accessing Workplace.

70 ~~65~~

IS 70 THE NEW 65?

When it comes to taking Social Security, waiting longer can offer the largest benefit.

When should you apply for Social Security? Many Americans start taking benefits as soon as they're eligible at age 62, while some wait until they reach full retirement age-66 or 67, depending on the year in which they were born. Still others postpone taking benefits until age 70 (the oldest age at which they can start benefits) to secure the largest monthly benefit.

While there's no one-size-fits-all approach for claiming Social Security benefits, one thing is certain: Social Security is a primary source of retirement income for tens of millions of Americans each year, providing 52% of their household income needs, on average.¹ For this reason, it's important to think carefully about which strategy is right for you.

Now or later?

Taking Social Security before reaching your full retirement age may offer certain advantages. For example, the benefits you receive may enable you to retire early or to cut back on your hours at work. But claiming benefits early comes at a price. If you start collecting benefits at 62, your monthly benefit amount will be permanently reduced by as much as 30%, depending upon the year you were born.² In contrast, the longer you wait, the higher your benefit will be.

Know your situation.

You can make a similar calculation based on your own age and earnings. The Social Security Administration offers two calculators-the Quick Calculator, which provides a preliminary estimate of your benefits based on your current year earnings, and the more in-depth Retirement Estimator, which accesses your complete earnings record.

Of course, deciding the right time to take your Social Security benefits involves several variables, including your earnings history, life expectancy and financial needs, among others. To better understand your Social Security options, speak with your local Mutual of America **Regional Office** representative.

THANK YOU, MUTUAL OF AMERICA!



Celebrating 28 years of support!

¹ United States Government Accountability Office, *May 2015 Retirement Security Report*

² Social Security Administration Online, *Early or Late Retirement*



6 TIPS FOR A TERRIFIC RETIREMENT

By Nancy Collamer, Retirement coach, author and blogger for NextAvenue.org

Originally published November 5, 2018 on Forbes.com and NextAvenue.org

The transition from work to retirement can be a challenge. As much as we complain about work, a full-time job provides us with a routine, a community and a sense of purpose. **If you want to enjoy a fulfilling retirement, you need to find a way to replace those benefits.**

But what's the best way to do that? How do you decide where to devote your time and energy?

I recently picked up some great advice on this from a small group of retired United Way executives attending the annual United Way Retirees Association gathering in Connecticut.

They invited me to join them over lunch for a chat about retirement, transitions and lessons learned from their experience.

Here are six key takeaways from our conversation:

1 Embrace “productive” leisure activities

As Next Avenue’s Richard Eisenberg recently wrote, many executives find it challenging to adjust to the slower pace of retirement. Yet the United Way folks I met said they’ve come to appreciate the restorative power of leisure.

While endless TV is draining, productive leisure activities like reading, travel and exercise can energize.

Rob Reifsnnyder, who retired just a few months ago from his job as president of United Way of Greater Cincinnati summed it up this way: “For the first time in 43 years, I have some space in my day. I do sometimes miss the importance and intensity of the work I did and the people I worked with. But I’m doing my best to stay connected and engaged in our community, and to contribute back in meaningful ways — while exercising and running more, reading more, spending more time with my wife Gretchen, traveling more, and getting more sleep!” He is also currently serving on two nonprofit boards, as well as several committees.

2 Set goals

As valuable as leisure is, you still need to be intentional about your life. That’s why Pat Fekete, the former president and CEO of the United Way of Denton, Texas, who retired in 2006, suggests a “for-my-eyes-only” retirement goals list.

She writes one each year around Thanksgiving and finds it helps her clarify priorities and focus so she can develop an interesting action plan. Her retirement goals list includes wellness and spiritual goals; travel and volunteer plans and ideas about fun new ways to spend time with her husband, children and grandchildren.

“We know that the years are getting shorter, so we want to fill them with memories,” she said.

3 Share your professional expertise

(on a flexible basis). As I frequently write on Next Avenue, many retirees work on a flexible basis, as consultants, temps, project workers or volunteers. While only a few members of the United Way group I met continued to work for pay in retirement, those who did said their work as consultants helped them remain professionally active, without the stress of a full-time job.

Reifsnnyder works five days a month as a consultant to United Way Worldwide (United Way’s global arm) and Terry Tolan, the former president and CEO of United Way Kentucky and executive director of the Kentucky Governor’s Office of Early Childhood, works 20 hours per week as a consultant to a variety of nonprofits.

4 Keep learning

Lifelong learning provides intellectual stimulation, a sense of accomplishment and new social connections, the United Way retirees told me. Those are just some of the reasons why Joe Tolan, former president and CEO of Metro United Way in Louisville (and husband of Terry), enrolled in classes at his local university after retiring and eventually earned a certification as a master gardener.

His studies included an internship as a master gardener, a commitment that required an additional 10 hours of continuing education and 40+ hours of community service. Tolan helped create a multi-feature garden at a local nonprofit that provides end-of-life support for people lacking family or financial resources.

This has proved an interesting new outlet for Joe, and Terry says it’s given the two of them a new community of friends they might not have met otherwise. “The members of the project he is involved with vary in age, gender, race and more,” she said. “They’ve all become our friends and we enjoy socializing together.”

5 Cultivate your creativity

At Next Avenue, we often write about the powerful impact the arts have on mental, emotional and social wellness. So I was pleased to learn that many of the

United Way retirees are actively involved in creative pursuits, including cooking, painting and photography.

Some treat these activities as fun hobbies; others view them more seriously.

Fekete said that other than spending time with her husband, her primary focus in retirement is her art. She paints (mostly watercolors) out of her home art studio; has served in a leadership capacity with three arts organizations and occasionally exhibits her artwork. She clearly savors the creative side of her work, but says her greatest joy comes from spending time around the close-knit community of other artists.

6 Pass it down

Sharing your legacy and life lessons with your grandchildren can be one of the most meaningful aspects of retirement, the United Way retirees told me.

A terrific example: Bob Ferriday, former chief financial officer of United Way of Greater Milwaukee, who wanted to teach his grandchildren the value of helping others. He offered a “soft challenge” to his two oldest grandchildren, then in their teens. He suggested they select a charity, research it and then report on their findings at the annual family Christmas gathering. If they agreed to the challenge, Ferriday would make a meaningful donation to their charity in their name and give them a small cash thank you for their effort.

The challenge proved such a success that it became an annual tradition enjoyed by nearly all of his 14 grandchildren.

Ferriday says this “legacy experiment” surpassed all his expectations. “Each grandchild took the challenge in good faith [with one exception], they gained valuable public speaking experience and it helped them realize how incredibly fortunate they are,” he notes.

One last retirement reminder from the group: Take care of yourself. Get enough sleep, exercise regularly and eat a healthy diet. The best retirement plan in the world means nothing, they said, if you don’t have the good health to enjoy it.

2018 UWRA LEADERSHIP GIVING CIRCLE

AS OF 12/10/18

Named Endowment Funds

Dick & Mary Lu Aft

Tom & Carol Brown

Alan & Selma Cooper

\$2,500+

Carl Zapora +*

\$1,000 - \$2,499

Mike Cabat

Barb and Tom Laing +*

Family of Donald Morgan +*

\$500 - \$999

Tom Brown +*

Leo Cornelius +

Susan Dunn *

Denise Durel

Susan Gilmore *

Ralph Gregory +*

Ed John* & Joyce Wilbur

Meritt Johnson

Amber Kelleher

John Kuropchak

Michael McLarney +*

Dennis Murphy +

Ed Rivera

Don & Mary Sanders +*

Judith Tieman Bird

Joe and Terry Tolan *

Madeline & Douglas Warns

Carole M. Watson

\$250-\$499

Hon. Edward Allard, III

Deborah Mariner Allsop

Meg Baxter

Deborah Bayle *

Michael Benz

Eugene Berres +*

James Brown

Sarah Caruso

Maria Chavez-Wilcox

Barbara Cronin

Bob & Sharron Cornelius

Family of Ron Drago

Barbara T. Edmond *

Jack R. Evans

Roger Frick *

Frank Hagel

Teresa Hall Bartels

Connie S. Hodges

Bernard Hyman

Barbara (Perry) Kaplinsky

Mildred Keays

David Lee +*

Myron Liner +*

William Mills *

H. Lovell Mosely *

Ed O'Brien

Beverly Prueter

Glenn Richter

Patricia & Brian Smith +

Sarah Smith Orr

James Taylor

Alice Thacker *

Tom Toronto

Claude Townsend

Jeffrey Wilcox

Garth Winckler

+ Endowment Founder / Contributor | * Current / Former Board Member



2018 UWRA LEADERSHIP GIVING CIRCLE

AS OF 12/10/18

\$100 - \$249

Al Acosta	Kenneth Euwema	Debbie Mason
Dick Aft +*	Winston Faircloth	Sara Matta
Deborah Ally	Pat Gobble Fekete	Don Mattise
Carol Aquino	Robert Ferriday III	David L. Maurer
Susan Arnett	Mary Fogarty	Tish McCutchen
Elizabeth Baier	Deborah Foster	William McQueen
Gerald Beggs	Jatrice Martel Gaiter	Henry and Mary Ellen Monaco
Bob Berdelle	John Geist	Ned Montgomery
Bud Biscardo	Ted Granger	Ted Moore +*
Kerry Blume	Mike Green	Jim Morrison
Eugene Blyther	W. James Greene	Michael Moynihan
Eleanor L. Brilliant +	Susan K. Hager	Christopher Nelson
Eleanor Brown	Joe Haggerty +	Richard O'Brien
Robert H. Brown	Sharon Hamilton	Elizabeth O'Mara
Carol Burger	Patrick Hanrahan	Jennifer Palazio
Warren Burt	Brian Hassett	Susan Panek
Kay Burtzloff	Winifred Helton +*	Joseph Pearson
Joseph Capita	Ted Hendry	Nancy Perry *
Viney Polite Chandler +*	Robert Hines	Judy Quinlan
Salvatore Cina	Bette Hoffman	Rob Rains
Benton Clark	Jack Holmes	Robert Reifsnnyder
W. Sloan Coats	Leslie Ann Howard	Shelley Ricker
Bonnie Cole	Mike Hughes *	Bill Robinson
Jack Costello	Anne Hunt	Jerry Ruane
Howard Cotner	Janet Jackson	Edward Schoenberger
Bobbie Creque	Rudolph Jackson	William Schwanekamp
Barbara Cronin	Ray Jacoby	Lauren Segal
Don Custis	Janet Jokisch	David Smith
Rick David	Ty Joubert	Ernest Strobel
Karen Davie	Frank Karr	Russy Sumariwalla +*
John DiCesare	Diana Kelly	Sue Suter
Eva Dillard	Elizabeth Kelly	Michael Thompson +
LTC Ralph Di Santo USA (Ret)	Kenneth Kemerling	Dirk Van Den Bosch
Gary Dollar	Michael Kint	Maria Vizcarrondo
Dawson Dowty	Sharon Kish	Lyanne L. Wassermann
Daniel Dunne +	Elizabeth Knowles	Beverly Weber
Mike Durkin	Robert Kulinski	Douglas Weber
Cynthia Eberhart	Ben Landers	George Wilkinson +*
Susan C. Eckert	Toni Lanford-Ferguson	Anne Wilson
John Eman	Carlos E. Lee	Roger Wood
Monica Estabrooke	Bill Link	Robert J. Woods
		Alex Young

+ Endowment Founder / Contributor | * Current / Former Board Member

THANK YOU, UNITED WAYS

UWRA's Organizational Members (as of December 10, 2018)

ALABAMA

River Region United Way
United Way of Central Alabama, Inc.
United Way of East Central Alabama, Inc.
United Way of Southwest Alabama, Inc.
United Way of West Alabama, Inc.

ARKANSAS

Heart of Arkansas United Way

ARIZONA

United Way of Graham County, Inc.

CALIFORNIA

Corona-Norco United Way
Orange County United Way
United Way Bay Area
United Ways of California
United Way of Greater Los Angeles
United Way Monterey County

COLORADO

Mile High United Way, Inc.

CONNECTICUT

United Way of Central and Northeastern Connecticut

DELAWARE

United Way of Delaware, Inc.

FLORIDA

Heart of Florida United Way
Town of Palm Beach United Way, Inc.
United Way of Broward County
United Way of Central Florida
United Way of Florida, Inc.

FLORIDA (cont'd)

United Way of St. Johns County
United Way of St. Lucie County
United Way of Northeast Florida, Inc.
United Way of Northwest Florida
United Way Suncoast

GEORGIA

United Way of Central Georgia, Inc.
United Way of Forsyth County, Inc.
United Way of Greater Atlanta
United Ways of Georgia Assn
United Way of the Central Savannah River Area
United Way of the Chattahoochee Valley
United Way of the Coastal Empire, Inc.

HAWAII

Aloha United Way

IOWA

United Way of Dubuque Area Tri-States
United Way of Muscatine, Inc.
United Way of the Quad Cities Area, Inc.

ILLINOIS

The United Way of Central Illinois, Inc.
United Way of Champaign County
United Way of Lake County, Inc.
United Way of Rock River Valley



THANK YOU, UNITED WAYS

INDIANA

Indiana United Ways
Lake Area United Way
United Way of Central Indiana
United Way of Delaware County, Inc.
United Way of Elkhart County, Inc.
United Way of Greater Lafayette & Tippecanoe County
United Way of the Wabash Valley, Inc.

KANSAS

United Way of Greater Topeka
United Way of the Plains

KENTUCKY

Metro United Way, Inc.
United Way of Kentucky
United Way of Southern Kentucky, Inc.

LOUISIANA

United Way of Acadiana
United Way of Central Louisiana
United Way of Northeast Louisiana
United Way of Southwest Louisiana, Inc.

MASSACHUSETTS

United Way of Greater Fall River, Inc.
United Way of Greater Plymouth County
United Way of Mass Bay and Merrimack Valley
United Way of North Central Mass., Inc.

MARYLAND

United Way of Central Maryland
United Way of the Lower Eastern Shore

MAINE

United Way of Eastern Maine
United Way of Greater Portland
United Way of Kennebec Valley

MICHIGAN

Capital Area United Way, Inc.
Michigan Association of United Ways
Plymouth Community United Way
United Way of Genesee County
United Way of St. Clair County
United Way of the Lakeshore

MINNESOTA

Greater Twin Cities United Way
United Ways of Minnesota

MISSOURI

United Way of Greater Kansas City
United Way of Greater St. Louis, Inc.

NORTH CAROLINA

United Way of Cumberland County
United Way Tar River Region

NEBRASKA

Heartland United Way, Inc.
United Way of Lincoln & Lancaster County



THANK YOU, UNITED WAYS

NEW JERSEY

United Way of Bergen County
United Way of Central Jersey
United Way of Greater Mercer County, Inc.
United Way of Hunterdon County
United Way of Monmouth and Ocean Counties, Inc.
United Way of Northern New Jersey

NEW MEXICO

United Way of Central New Mexico

NEVADA

United Way of Northern Nevada and the Sierra

NEW YORK

United Way of Greater Rochester, Inc.
United Way of the Greater Capital Region
United Way of the Valley & Greater Utica
United Way of Tompkins County

OHIO

Ohio United Way
United Way of Central Ohio
United Way of Fairfield County
United Way of Greater Cincinnati
United Way of Greater Cleveland
United Way of Greater Lima, Inc.
United Way of Greater Stark County
United Way of Greater Toledo
United Way of Hancock County
United Way of Licking County
United Way of the Greater Dayton Area
United Way of Warren County Ohio

OKLAHOMA

Tulsa Area United Way
United Way of Central Oklahoma, Inc.
United Way of Norman, Inc.

PENNSYLVANIA

United Way of Berks County
United Way of Lancaster County
United Way of the Capital Region
United Way of the Greater Lehigh Valley
United Way of York County

SOUTH CAROLINA

Trident United Way
United Way of Anderson County
United Way of Greenville County, Inc.
United Way of the Lowcountry, Inc.

TENNESSEE

United Way of Greater Kingsport, Inc.
United Way of Greater Knoxville
United Way of Metropolitan Nashville
United Way of the Mid-South
United Way of the Ocoee Region, Inc.
United Way of Williamson County



THANK YOU, UNITED WAYS

TEXAS

Lubbock Area United Way, Inc.
United Way of Amarillo & Canyon
United Way of Brazoria County
United Way of El Paso County
United Way of Greater Baytown Area & Chambers Cty
United Way of Greater Houston
United Way of Metropolitan Dallas, Inc.
United Way of San Antonio and Bexar County
United Way of South Texas
United Ways of Texas

UTAH

United Way of Central & Southern Utah
United Way of Salt Lake

VIRGINIA

Rappahannock United Way, Inc.
United Way of Greater Richmond & Petersburg
United Way of Roanoke Valley, Inc.
United Way of South Hampton Roads
United Way Worldwide

WASHINGTON

Spokane County United Way
United Way of Pierce County
United Ways of the Pacific Northwest
United Way of Thurston County

WISCONSIN

United Way of Dane County, Inc.
United Way Fox Cities, Inc.
United Way of Greater Milwaukee & Waukesha County
United Way of Portage County
United Way of Racine County
United Way of Wisconsin



2019 UWRA BOARD OF DIRECTORS

Carl Zapora, *Board Chair*

Susan Gilmore,
Board Chair-elect

Ed John, *Treasurer*

Susan Dunn, *Secretary*

Joe Tolan,
Vice-Chair, Membership

Deborah Bayle,
Vice-Chair, Programs

David Lee, *Vice-Chair,
Revenue Diversification*

Ralph Gregory,
Immediate Past Board Chair

Dick Aft,
Emeritus Board Member

Shannon Abitbol

Barbara Edmond

Roger Frick

Thelma Garza

Janet Jackson

Bill Mills

Ed Rivera

With sincere gratitude to the 2018 retiring Board members: H. Lovell Mosely, Judy Quinlan and Carole Watson



**United Way
Retirees Association**



CENTURIES OF PERSPECTIVE, EXPERIENCE AND KNOWHOW

by Dick Aft, UW Historian and Emeritus Board Member

It started as a question at a recent United Way Retirees Association Board meeting. How many years of experience were represented by the association's 15 Board members? The answer: 469. Add to that the many years that other retirees and alumni whose career paths included United Way staff service and you begin to describe a phenomenal resource!

UWRA Board members spend hundreds of hours each year mentoring, coaching, and training individuals and groups on subjects that include gift planning, leadership, and preparation for retirement. They return to the work force as interim United Way staff members. They record parts of the 130+ history of the United Way movement. While their combined centuries of experience and knowhow often represent an under-tapped resource, it's small compared to the vast wealth of talent represented by retirees and alumni.

United Way retirees represent experiences and know the stories. Job descriptions outline the work employees do, but shared experiences and stories provide the passion. Our brains love stories. Why? According to researcher Paul J. Zak, in a 2013 UC Berkeley-based "Greater Good" article, "The first part of the answer is that as social creatures who regularly affiliate with strangers, stories are an effective way to transmit important information and values from one individual or community to the next." Given the limited amount of United Way history that has been published, retirees only need to be asked to share their experiences and stories.

Alumni of United Way have careers that give them fresh perspectives of the challenges facing United Way. Too often overlooked, former staff and volunteers generally pride themselves on their past involvement with United Way. They represent a treasure seldom tapped.

So many resources...just waiting to be asked to Stay United!

CONTACT US:

Call

1-800-892-2757x624

Workplace

<https://www.unitedway.com>

Email

uwra@unitedway.org

Website

www.uwra.org