



# UPDATES

Issue 1, 2019

## UWW CEO MEETS WITH UWRA BOARD, UNDERSCORES UNITED WAY TRANSFORMATIONS

Brian Gallagher, President and CEO of United Way Worldwide, attended UWRA's recent Board of Directors meeting to provide an update on United Way Worldwide and the United Way network. What follows is a summary of his comments and observations.

By Brian Gallagher, President and Chief Executive Officer, United Way Worldwide



Without question, the rate of change in United Way is increasing in direct proportion to the increasing speed of technological change. This

phenomenon is requiring us to revolutionize the way we do business. Four major transformations have reshaped United Way, both locally and globally, since the turn of the century.

- 1. Governance and Brand** – We recognized the necessity to be more disciplined and consistent about local United Way governance and brand stewardship. In 2002, we re-evaluated our membership requirements and clarified exactly how the United Way brand and brand mark can be used. This work was essential to protect the reputation of every single United Way around the world.
- 2. Mission and Purpose** – A 2002 survey indicated that 50% of United Ways defined their core purpose as fundraising and 50% defined it as community impact. Today, well over 90% of the 1,800 local United Ways around the world articulate, and are committed to, a mission defined

by community and social impact - with fundraising and other key activities as strategies that support the pursuit of our mission.

- 3. A Worldwide Organization** – In 2009, we merged United Way of America and United Way International to create United Way Worldwide. We now have a more effective, consistent, and transparent worldwide network that has grown to \$1.1 billion in annual revenue outside of the U.S. Local United Ways in all 41 countries run employee giving and volunteering efforts. We established a self-sustaining network in India. We signed our long-time partner in China to a partnership agreement. We brought in UW Centraide Canada as a full member for the first time in their 100-year history. In short, we have become a truly global NGO.
- 4. A Digital Organization** – We are now in the midst of our 4th and most significant transformation in just over 15 years – becoming a digital organization. United Way Worldwide organized a group of United Ways in North America into a digital services operating group, invested millions of dollars to create digital content from local United Way's impact work and third-party providers, and have entered into a strategic

partnership agreement with Salesforce to create a new philanthropic marketplace. Philanthropy Cloud is a game-changing platform that will inspire, connect, and empower individuals and organizations to engage in causes they care about and create change at scale.

What's next? Continued success in fulfilling our vital mission, so long as we all continue to demonstrate our historical capacity to transform ourselves in response to change.

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## Chair's Corner

by Carl Zapora

Welcome to United Way Retirees Association members, both individuals and local United Ways.

2018 was a great year for us. Our staff and board worked hard to get through a year of transition under the great leadership of Board Chair Ralph Gregory. Our search for a new CEO to replace long-

standing CEO Tricia Smith (who moved on to "Worldwide") was most successful. We are joined by a very experienced and enthusiastic CEO Amber Kelleher.

Amber has hit the ground running and our plans for 2019 are now in place with three new work groups focusing on our most important goals:

- **Advancing UWRA's relevance and responsiveness to members (led by Joe Tolan, Vice Chair of Membership)**
- **Strengthening member benefits for individual and organizational members (led by Deborah Bayle, Vice Chair of Programs)**
- **Identifying and acquiring revenue from diversified sources (led by David Lee, Vice Chair of Revenue Diversification)**

As a small nonprofit organization with a modest budget (only \$175,000), we must operate efficiently and stay solid. Under Amber's leadership, we have streamlined

the organization's processes (simpler accounting software, for example) and created more customer (member) focused communications and billings. We also hope to engage more frequently with our members, both electronically and in person (for example, at regional United Way conferences and UWRA's own "Gathering" in September in Alexandria).

Lastly, our Board of 15 members (listed on the back page) is energized and committed to supporting Amber and the execution of our priorities.

My thanks to these dedicated Board members (who work without pay) and our small but mighty staff of one (and periodic contracted help as needed).

Thanks to each of you for your help and support. Your membership is much appreciated. Let us know any time (tel: 703-836-7100, x624 or email: [uwra@unitedway.org](mailto:uwra@unitedway.org)) of your ideas, questions or recommendations to help us better serve and engage United Way retirees, alumni and friends.

SEP 30-OCT 4

SAVE THE DATE:  
2019 UWRA GATHERING

ALEXANDRIA, VA



Mark your calendars and join us in Alexandria, Virginia for our 2019 Fall Gathering, starting Monday, September 30th and ending Friday, October 4th.

Our time together will begin with a welcome reception on Monday afternoon at United Way Worldwide, where the executive management team will join us. Several optional excursions will be offered throughout the week to showcase the DC region. There will also be opportunities to gather each morning and evening in our hospitality suite. We'll end the week with a breakfast send-off on Friday morning.

Many of your fellow UWRA members have attended past gatherings and agree it is a relaxing and fun way to connect with colleagues and explore select local attractions.

Please hold the dates while we finalize the itinerary. Registration details will be available shortly. If you have any questions, please contact a member of the planning committee: Barbara Edmond ([btedmond27@gmail.com](mailto:btedmond27@gmail.com)), Susan Gilmore ([susantgilmore@gmail.com](mailto:susantgilmore@gmail.com)), or Bill Mills ([billmills2020@gmail.com](mailto:billmills2020@gmail.com)).



# WELCOME NEW MEMBERS

David Kennedy (Milford, CT)

Rebecca Petty (Southlake, TX)

Cathy Yowell (Magnolia, TX)

Brenda Ollie (Memphis, TN)

Barbara Wentworth (Saco, ME)

## President's Message

by Amber Kelleher

I was struck by Dan Dunne's insightful words (page 6):

***"Volunteers multiply and magnify the efforts of staff."***

Nonprofit leaders know this to be true. Volunteers can be the backbone of an organization and the champions behind change. Much of the work we do at UWRA – including this newsletter - would not be possible without the gracious efforts and energy from volunteers.

### **Volunteers know the network.**

UWRA's Board Members rank at the top of my list for freely sharing their time and talent with this organization. There is rarely a week (or a day?) that goes by without me asking one of them to be an ambassador, an author, an editor, or simply a sounding board for new ideas. My requests are met with eager replies and sage advice. We are truly privileged to have this esteemed group of United Way professionals, led by Board Chair Carl Zapora, overseeing UWRA.

### **Volunteers bring unique competencies.**

During the past 12 months, I've also been incredibly fortunate to work with close to 15 pro bono consultants from Taproot+ (<https://www.taprootplus.org/>), an organization that matches skilled volunteers with nonprofits.

Functional specialists with full-time jobs volunteered hundreds of hours over multiple weeks and months to assist me with operational audits, data analysis, and business development strategies – definitively multiplying and magnifying our own efforts.

### **Volunteers are treasured.**

Our extraordinary intern, Caitlin Crawford, intended to spend a summer with us. Nine months later, she's still pitching in when we need support.

### **Volunteers cultivate leaders.**

Many UWRA members actively volunteer as coaches, mentors, and consultants to United Way staff across the Americas, expanding the network's capacity and contributing to local success.

### **Volunteers are everywhere.**

I recently discovered Stephanie Sansoucie, Kohl's Director of Customer Experience, who also runs design thinking workshops for Further Labs ([www.furtherlabs.net](http://www.furtherlabs.net)) in Milwaukee, Wisconsin. Stephanie enthusiastically jumped in to fill a speaker cancellation at the Great Rivers conference and helped me facilitate a session on Engaging Boomers and Retirees Beyond the Workplace, just because she likes to give back – especially to organizations like United Way that are making an impact on communities.



### **Volunteers may live longer.**

According to Harvard Health Blog, volunteering helps people who donate their time feel more socially connected; and a growing body of evidence suggests volunteering also leads to better physical health.<sup>1</sup>

So, cheers to all of you who spent your careers making a difference in your communities and continue to give back as volunteers. We couldn't do this important work without you.

<sup>1</sup>Watson, Stephanie. "Volunteering May Be Good for Body and Mind." Harvard Health Blog, Harvard Health Publishing, 30 Oct. 2015, [www.health.harvard.edu/blog/volunteering-may-be-good-for-body-and-mind-201306266428](http://www.health.harvard.edu/blog/volunteering-may-be-good-for-body-and-mind-201306266428).



# HOW AN INTERIM CEO PLACEMENT PAVED THE WAY FOR SUCCESS IN ARIZONA

By Shannon Abitbol, UWRA Board member

as a candidate for UWGGC. Maurine was one of nine highly qualified candidates reviewed by UWGGC's board.

After visiting UWGGC and interviewing with the President and Vice President of the board, Maurine accepted the interim position and signed a 6-month contract to serve as UWGGC's first official staff leader. UWGGC's board clearly defined the focus and responsibilities for Maurine's term, which included the following:

- **Completing an organizational assessment**
- **Drafting and proposing organizational best practices including developing HR policies and procedures**
- **Reviewing financial and budgeting practices**
- **Working with the board of directors focusing on governance development**
- **Mentoring board members to create a vision of the future**
- **Reviewing key community relationships and partnerships**
- **And most importantly, recruiting a full-time CEO**

*The old phrase 'you don't know it, 'til you know it' really describes how an interim can help open the eyes, ears and possibilities of an organization.*

*- Maurine Dyer Stevens,  
former Interim CEO of UWGGC*

Maurine developed a detailed scope of work that identified tasks, timelines, action steps and outcomes to achieve. It also included her recommendations for next steps in organizational development, including potential opportunities and specific areas for future attention. The scope was a working document that guided organizational focus and was modified as needed.

From the perspective of the board of directors, the interim CEO placement was extremely successful. They found Maurine to be an excellent communicator with a cohesive work style. She was comfortable following the direction of the board and offering her perspective in ways that helped them see the bigger picture. Her work plan highlighted the strengths and weaknesses of the organization while setting a clear direction for their future.

*The board of UWGGC is extraordinarily pleased with how the interim process went.*

*- David Himmelfarb, former UWGGC Vice President of the board of directors*

David Himmelfarb noted, "When you're an all-volunteer organization, and you've been managing without the help of staff, it is hard to know what it is going to look like when a professional takes over. The transition is huge and potentially difficult, but it went smoothly. We are extraordinarily pleased with the outcome."

After just 6 months, Maurine's list of accomplishments was long. She created a solid infrastructure for the organization, coordinated the organization's first audit, communicated impact results to the community, and forged stronger bonds between board members. She also partnered with the board of directors to recruit the right CEO to fit the current and future direction of the organization. Maurine wrapped up her time as interim CEO in January 2019, overlapping her last month with the new CEO to facilitate a seamless transition.

In the end, the interim CEO option worked very well for UWGGC, paving the way for its future success.

Email [uwra@unitedway.org](mailto:uwra@unitedway.org) for more information about interim placement opportunities.

United Way of Graham and Greenlee Counties (UWGGC) in Safford, Arizona had been volunteer-led for years. As community needs grew, the board of directors recognized the value of having professional staff to advance the initiatives they were building with their \$2.5 million annual budget. By May 2018, the board agreed it was time to look for the organization's first CEO.

Sometimes, getting started is the hardest part.

The board of directors of UWGGC knew they needed a full-time staff leader, but initially lacked a clear path for turning their goal into a reality. They decided to consider an interim CEO after staff members at United Way Worldwide suggested they enlist the help of the United Way Retirees Association (UWRA). The idea of finding an interim professional who was already familiar with the United Way network made a lot of sense to board members. David Himmelfarb, Vice President of the board of directors during the interim search, noted that UWRA was extremely helpful in mentoring UWGGC through all aspects of the hiring process - including costs, advertising and expectations.

Maurine Dyer Stevens was a new member of UWRA when the interim CEO announcement landed in her inbox. She had held many leadership positions throughout her career, including roles with United Way, and thought the interim opportunity was well-suited to her experience and expertise. Maurine was the first CEO for two other organizations and felt compelled to offer her assistance, once again,

# GIVE 5 CIVIC MATCHMAKING PROGRAM IN SPRINGFIELD MO TEACHES THE “WHY”



The key difference between Give 5 graduates and a typical volunteer is that Give 5 teaches participants the “why” -- why volunteering is important in their community -- and the “how” -- how they can be a part of the solution. “Most people want to be part of the solution. The most interesting dynamic happens when Give 5 classmates have their eyes opened about the things going on around them, right in their own community,” Burris says.

Each class consists of 20-25 people who participate in five program days over five weeks (one day per week). Day 1 includes a half-day orientation that enlightens classmates about issues surrounding poverty and other economic and social trends affecting the city. After lunch, the class boards a bus and tours three nonprofit organizations.

The Day 1 orientation is key to why the program works. Through a series of heat maps and other information, classmates get a thorough look at issues affecting Springfieldians’ quality of life, learn how these issues interrelate, and see how the community is working together to address both the “upstream” causes and “downstream” symptoms of poverty. They also learn about the challenges policymakers and other community leaders face in their work to address priority issues.

Participants get to know one another well on Day 1 through a series of exercises that allow them to share their talents, hopes, and passion for giving back to the community. Participants are intentionally recruited from a diverse population, with a goal of opening minds and hearts and forging new connections among participants. It’s not unusual for participants to share their feelings of isolation in retirement. Give 5 provides an outlet to either stay engaged or re-engage.

Program days 2-5 each begin with a one-hour classroom session consisting of presentations by selected community leaders, followed by visits to five nonprofits. Visits to nonprofits allow participants to “see behind the curtain” to better understand the types of volunteer opportunities available and the role these organizations play in the community.



“They become super volunteers,” Burris explains. “They’ve learned about the challenges in the community and how those challenges are being addressed, and armed with that knowledge, are now ready to roll up their sleeves and use their expertise to make a difference.”

The sense of purpose and identity people get from a lifetime career can fade in retirement. “The thing our Give 5 classmates keep mentioning is that they want to feel relevant. Being part of the solution helps them feel relevant and re-establishes their identity,” Burris says.

For more information about Give 5 visit [www.Give5program.org](http://www.Give5program.org) or email [gburris@uwozarks.com](mailto:gburris@uwozarks.com)

The United Way of the Ozarks (UWO), based in Springfield, Missouri, is providing a unique experience for retirees that is creating positive ripples across the community. It is a level of engagement that program founder Greg Burris couldn’t even imagine when he first launched it as Springfield’s City Manager in December 2017. After an eight-day retirement last summer, Burris agreed to serve as UWO’s executive in residence and brought the popular program with him. In just over a year, 112 Greene County retirees have completed the program and are now plugged into Springfield’s nonprofit organizations focused on addressing poverty.

The nonprofit organizations and the citizens they serve are not the only ones benefitting from the highly-skilled and community-minded volunteers that Give 5 produces, however. Burris and co-creator Cora Scott, Springfield’s Director of Public Information and Civic Engagement, have designed the program from the participant’s point of view, recognizing that all communities have an amazing, largely untapped asset in their retiree / older adult population.

“This is not like the typical volunteer engagement,” Burris says. “We are a generation that has planned and saved for an active retirement – one that is driven by choice, opportunity and purpose. We have an inherent need to feel relevant, not feel like we’re being put out to pasture. Everyone needs to feel needed.”

Give 5 is a civic matchmaking program that re-introduces meaning, purpose and relevance in people’s lives and helps address social isolation while building “bridging” social capital in a community. Participants learn about the core issues in their communities, what area nonprofit agencies are doing to address those issues, and most importantly, how they can be a part of the solution.





# MEET ONE OF UWRA'S PRO BONO PLANNED GIVING ADVISORS

By Mary Lambkin, Taproot Consultant and UWRA Volunteer

The United Way Retirees Association (UWRA) has a small cadre of planned giving advisors who offer pro bono guidance to local United Ways that are interested in launching or growing their planned giving and endowment programs. UWRA recently spoke with Dan Dunne about the assistance he provides to the network.

**UWRA: Let's start with some background on your tenure with United Way.**

Dan Dunne: I've been with United Way for more than 40 years, starting in 1972 as Associate Director of United Way of Northeast Florida. Since then, I've held various positions, including Executive Director and President & CEO for United Ways in North Carolina and Alabama. In 2008, I retired and spent the next five years consulting for United Way and other nonprofits. I worked with several United Ways around the country, mostly on Tocqueville and planned giving. The majority of my time was dedicated to United Way of Central Alabama (Birmingham), where I spent 20 hours per week on planned giving and special projects.

*Volunteers multiply and magnify the efforts of staff*

**UWRA: How did you acquire your planned giving knowledge?**

Dan Dunne: I learned a great deal by just listening to donors and volunteers. I also made a concerted effort to continually seek out educational opportunities through United Way materials, conferences on planned giving, and keeping track of what colleges, universities, and other nonprofits were doing.

**UWRA: Can you share an "Aha" moment related to your planned giving work?**

Dan Dunne: Volunteers multiply and magnify the efforts of staff. They have relationships and can get appointments. They bring additional

credibility to prospects. Volunteers can answer questions, share why they are involved, and ask prospects to consider endowing their gifts. When I think about our planned giving success in Birmingham, the secret was having volunteers supported by staff. This is especially important for United Ways with limited capacity and resources.

**UWRA: Where do United Ways tend to "get stuck" with their planned giving efforts?**

Dan Dunne: One of the most common challenges I see is getting United Ways to focus on planned giving as a long-term priority. Planned giving doesn't deliver quick results. It requires persistent hard work, frequent visits with prospects, and ample staff time and funding over months and years. These long-term efforts need to be supported by measurable short-term goals, such as visiting a certain number of donor prospects every week.

**UWRA: What are some examples of guidance and support you've provided through your role as a planned giving advisor for UWRA:**

Dan Dunne: I've enjoyed supporting UWRA's planned giving efforts by sharing my experiences and lessons learned. UWRA often asks me to respond to questions that came up during webinars or to follow up with a phone call to someone who wants to learn more. Occasionally, that will lead to a request to spend time on-site with a United Way.

When it comes down to it, planned giving is about friendly visiting with generous and loyal donors. It takes time to produce results, but when those results start to come in, they can raise more new dollars than new dollars in the annual campaign. That's a nice surprise!

*When it comes down to it, planned giving is about friendly visiting with generous and loyal donors*

**UWRA: Are there common themes among the inquiries you receive?**

Dan Dunne: Often, the questions are about how to get started in planned giving and the best ways to grow an endowment. I typically send over basic planned giving materials and sample forms. I also offer guidance on how to recruit volunteers, how to identify champion volunteers and staff, how to use staff and volunteers to make visits with prospects, how to engage the board, and how to identify loyal and generous donors. I also help staff find time to support planned giving among other priorities, as well as find time to share and celebrate success stories.

I typically encourage United Ways to start with a simple, straightforward note in their signature line, such as, "Please include United Way in your will or estate plan and tell us when you do."

**UWRA: Please share one of your proudest planned giving accomplishments.**

Dan Dunne: In my first weeks as President & CEO for United Way of Central Alabama, my predecessor, David Orrell, and I discussed our shared vision for launching planned giving. He introduced me to a loyal donor who asked me what I hoped to do as the new CEO. I said,

“We need a champion donor to help United Way start a planned giving program.” We gave the donor a proposal - which requested \$100,000 over three years – and he awarded us the \$100,000. Fast forward to 2018, and United Way of Central Alabama has an endowment of about \$20 million and expectancies of \$38 million. They are allocating more than \$5 million for community impact work and have several full-time planned giving staff members. Birmingham also has the most Tocqueville members in the U.S. who have endowed their annual Tocqueville gifts.

**UWRA: What are some simple, practical tips or words of advice that will help a United Way take their first steps?**

Dan Dunne: My best advice is to do four things with your loyal donors:

1. **Make an appointment to thank them for their involvement and ask them why they support United Way;**
2. **Listen carefully to their story. How can their hopes and dreams be perpetuated?**
3. **Ask if they would consider endowing their annual gift in their will, estate plan, or by other means. It takes 25 times the annual gift to endow it and keep its purchasing power.**
4. **Give them a commitment form to sign when they are ready and ask when you can check back with them.**

Those nonprofits with billion-dollar endowments began with one gift and one or two people asking. They kept doing the planned giving work - day after day, decade after decade. Every no brings you closer to a yes. Keep asking.

## MEMBER BENEFITS



**Attend the UWRA Member Gathering in Alexandria, Virginia (Sep 30 – Oct 4)**



**Receive the UWRA Updates newsletter, published three times each year**



**Join the UWRA Members group on Workplace (<https://fb.me/g/2tCM9O8C4/wx2j6TVA>)**



**Receive daily Breakfast emails from United Way Worldwide**



**Access United Way Online (UWO)**



**Search job postings across the United Way network**



**Volunteer for coaching, mentoring, and specialized consultative support for United Ways**

## IN MEMORIAM



Please visit the UWRA Memorial Wall at <http://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](mailto:UWRA@unitedway.org) for more information about memorial gifts and endowment contributions.

**Do you have experience launching and/or growing planned giving and endowment programs?  
Are you available 1-2 hours per month to answer planned giving questions from smaller United Ways?**

**Please email [uwra@unitedway.org](mailto:uwra@unitedway.org) and let us know you can help.**

# TRAVEL TIPS (PART TWO)

By Carl Zapora, Frequent Traveler  
& UWRA Board Chair

As the mid-America regional director for United Way of America for six years, I traveled a lot around ten states, to Alexandria, and to national conferences. Along the way, I read many articles about traveling, packing, and ways to make travel easier.

One of my favorites is to pack two kits. One is the toiletry kit, containing the essentials, i.e., small items containing liquids, travel shaver, meds, etc. The goal is for this kit to be self-contained and ready

to go. Ditch your big shaver and purchase a travel one (smaller and lighter). Re-stock it when you get home from your trip. Skip your personal shampoo, conditioner, and anything else that the hotel will have. The “mini-section” at the drug store is your friend to find travel-sized items.

The other kit is your “gizmo” kit. It, too, is always ready to go and filled with items that come in handy. Phone cords and cables. Lanyard for name badge. Flat duct tape (yes, there is such a thing). Ear plugs. Mini stapler and staples. Mini flashlight. Binder clip to close drapes (the gap always lets sun peak in). Spare batteries. Small piece of twine. Few zip-strips. Small vice-grips. Spare pen. Key rings to replace bulky rental car company ones. Rubber bands. Small baggies. Cork screw. Hotel, airline,

car rental membership cards. Travel extension cord with multiple electrical and USB plugs. This one is most helpful as it seems the plug at the desk is often under the desk or somewhere inconvenient.

Lastly, here are a few of the latest tips I've read. Need a toothbrush holder? Punch a hole in the bottom of a paper coffee cup with the base of your toothbrush and place the cup upside down on the counter. Lost your binder clip in your gizmo kit? A clip pants hanger will do in a pinch to close the gap in the drapes. Need a cell-phone prop? Dent an empty soda-can in the middle, all the way down. Use the plastic laundry bag in the closet to wrap your shoes and protect your clothes in your luggage.

I hope these tips are helpful. Happy travels!



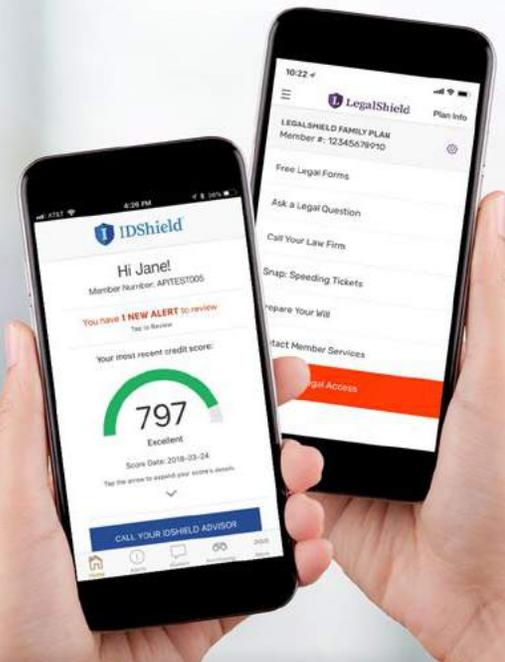
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- 24/7 emergency legal access
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- And more!

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- Password manager
- 24/7 emergency access
- Mobile app
- And more!



### AFFORDABLE PROTECTION

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\*This is a general overview of the legal and identity theft protection plans available from LegalShield for illustration purposes only. See plan details or plan contract for specific state of residence for complete terms, coverage, amounts, conditions and exclusions.

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# 2018 LOYAL CONTRIBUTORS

## MEMBERS SINCE THE BEGINNING

Robert Anthony \*   John Garber +   W. James Greene   H. Allen Larsen +\*

## 25 YEAR MEMBERS

Eugene Berres +\*   Anne Hunt   Carlos E. Lee   Isadore Seeman  
Alan Cooper +\*^   Bernard Hyman +\*   Thomas Murphy   Claude Townsend  
Howard Cotner   Jerry Jirik \*   Richard O'Brien   George Wilkinson \*  
Ralph DiSanto   Mildred Keeyes   David Orrell  
Calvin Green   Daphne Lamb   Arthur Redding \*

## 20-24 YEAR MEMBERS

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Gerald Beggs   Marietta Floyd   Myron Liner \*   Mary Staples  
Donald Buck   Mary Fogarty   John McCormick \*   Thomas Sullivan  
Irene Burnett +   Linda Forbes   William McCullough   Russy Sumariwalla +  
Warren Burt   Richard Fusco \*   William McQueen \*   Anita Terranova  
Robert Carr   Dale Gray \*   Julie Mercer   Alice Thacker \*  
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Lettie May Clawson   Winifred Helton +\*   Dennis Murphy +   Patti Anne Vassia  
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Leo Cornelius +   Mike Hughes +\*   Edward O'Brien  
Jack Costello +\*   Rudolph Jackson   Sarah Orr  
Donald Custis +\*   Jerald Johnson   Sunshine Overkamp +\*  
Joel Davis   Merritt Johnson \*   Charles Reynolds  
Wayne Davis +   Donald Jordan   Jerry Ruane  
John DiCesare   Frank Karr   Sandra Rupp

+Endowment Founder / Contributor

\*Current / Former Board Member

^Named Endowment Fund Contributor

Please notify [uwra@unitedway.org](mailto:uwra@unitedway.org) if you notice information that needs to be updated.



# 2018 LOYAL CONTRIBUTORS

## 15-19 YEAR MEMBERS

Lynn Anderson	Bonnie Cole	Janet Jokisch	James Pearce
William Baker	Mary Steele Collins	Marjorie Jordan	Douglas Perkins
Jacquelynne Bates	Bobbie Creque	Yezdyar Kaoosji	Karen Pickard
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Guy Benson	John Eman	John Kuropchak	Jerry Powell
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Eugene Blyther	Robert Fleischer	William Losch	Amanda Rosenberg
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Erich Briggs	Roger Frick *	Allan McCobb	Martin Scherr
Eleanor Brilliant +	Charles Galupi	Weldon Mikulik	Patricia Schirtz
Jack Brooks	John Geist	Sharon Miles	Donna Shea
Tom Brown +*^	Sharon Hamilton +	Henry Monaco +*	Ron Spillane+
Gerald Callahan	Shirley Hill	Jo Nelson	Ernest Strobel
John Carey	Martha Hughes	David Odenbach	Ruth Ellen Trotter
Fred Cerny	Janet Iden	Rosa O'Neal	Dirk Van Den Bosch
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Benton Clark	Lois Jandernoa	Susan Paradine	Garth Winckler
Doris Clark	Carol Jennings	Edmund Parker	Donna Yannuzzi
John Clark	Ed John +*	Louis Pascek	Wanda Young

+Endowment Founder / Contributor

\*Current / Former Board Member

^Named Endowment Fund Contributor

Please notify [uwra@unitedway.org](mailto:uwra@unitedway.org) if you notice information that needs to be updated.



# 2018 LOYAL CONTRIBUTORS

## 10-14 YEAR MEMBERS

Edward Allard, III	Deborah Foster	Sue Lawrence	John Provance
Margaret Anderson	Anna Gines	David Lee +*	Barry Raker
Carol Aquino	Pat Gobble Fekete +*	Bertha Lewis	Judy Ranieri
Linda Avedon	Bob Gragson	Bill Link +	Robert Reifsnnyder
Alice Azure	Ted Granger	Walter Masal	Mrs. Vito Rigillo +
Elizabeth Baier	Bonnie Grant	Vickie Maurer	Bill Robinson
Janet Bates	Mike Green	Beth Maze	Juliet Rowland +*
Nancy Biernbaum	Ralph Gregory +*	Donald McKee	Egon Sieper
Pedro Blanco	Teresa Hall Bartels	Tim McKinney	Bruce Simmeth
Larry Burdett	Helen Hemmes	Michael McLarney +*	Lynda Smith
Kay Burtzloff	Mary Hummel	Sherry McTyeire	Patricia Smith +
Joseph Calabrese +*	Edward Jenkins	William Mills *	Ron Stevens
James Colville +*	Ray Jacoby	Donald Morgan	Linda Tuday
Dale Depoy	Larry Johnson	H. Lovell Mosely *	Ken Unzicker
Eva Dillard	Donna Johnson	Christopher Nelson	Douglas Warns
Marilyn Donnellan	Barbara (Perry) Kaplinsky	Fred Newman	Madeleine Warns
Susan Dunn *	Virgil Keller	Wayne Niles	Douglas Weber
Barbara Edmond *	Suzanne Kelley	Charles Page	Robert Woods
Robert Ferriday III	Diana Kelly	Joseph Pearson	Carl Zapora +*
Dolores Ford	Robert Kulinski	Nancy Perry	

+Endowment Founder / Contributor

\*Current / Former Board Member

^Named Endowment Fund Contributor

Please notify [uwra@unitedway.org](mailto:uwra@unitedway.org) if you notice information that needs to be updated.



## 2019 UWRA BOARD OF DIRECTORS

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*Board Chair-elect*

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Bill Mills

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## HISTORICAL PERSPECTIVES

### CONTINUOUS TRANSFORMATION - KEY TO UNITED WAY SUCCESS

by Dick Aft, UWRA Historian and Emeritus Board Member

Throughout our history, United Way survival has reflected our capacity to respond to external change.

These days, United Way transformation mirrors the accelerating rate of change in technology, as observed by Brian Gallagher during a recent presentation to the UWRA Board of Directors.

The radical idea of sharing the identity of clients led 1876 providers of food, shelter, and clothing to Boston's poor to avoid duplications of service. In 1886, sharing donor lists led leaders of the first United Way campaign in Denver to realize fundraising efficiencies that were unavailable to individual charities.

20th Century transformations initiated by United Way leaders included:

- Federations of Social Agencies transformed their individual fundraising efforts - beginning in Cleveland in 1913 – by combining campaigns based on information shared among the people who comprised social agency boards.
- *Noblesse oblige* supported the lion's share of United Way budgets through the 1920s until campaigns underwent major transformation in 1930. Hourly wage earners in Cincinnati instituted the first workplace campaign in response to the needs of their neighbors during the Great Depression. Word of this innovation spread quickly. By 1933, Community Chest workplace campaigns were commonplace.
- GIs returning to Detroit from World War II led Detroit's introduction of "citizen review" as the basis of agency allocations. Their leadership led to the transformation of the agency-led allocation programs, standard Community Chest/ War Chest practice, to decision-making by independent volunteers.
- Two United Way transformations occurred when the 1964 "War on Poverty" began to circumvent state and local decision-making authorities. As federal bureaucrats increased their funding of local non-profit organizations, United Community Funds & Councils of America, a predecessor of United Way Worldwide, instituted public policy programming and relocated its office from the heart of Manhattan's business district to a place within easy reach of governmental decision-makers.
- Saul Bass' 1972 introduction of United Way's trademarked "helping hand" logo prompted a transformation toward required and uniform graphic standards.
- The United Way of America Service Identification System (UWASIS) was introduced in 1973, setting the stage for decades of transformation in planning, prioritizing, evaluating, and funding health and human services. UWASIS provided standard definitions that made purchases of services, definitions of service outcomes, and measurement of service impact possible.

The pace of environmental change is only increasing, and the vitality of United Way is directly related to its leaders' willingness to lead change. Many retirees remember saying, "This isn't your father's United Way." These days, the people who are transforming our movement's capacity to serve are saying, "This isn't last year's United Way!"



**United Way  
Retirees Association**

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