



United
Way



United Way
Retirees Association

UPDATES

Issue 1, 2021

FOUNDATION FOR THE CAROLINAS PROVIDES \$10K CHALLENGE GRANT TO UWRA

In celebration of the 20th anniversary of UWRA's Endowment, the Foundation For The Carolinas (FFTC) has approved a challenge grant of \$10,000 to UWRA.

The challenge grant builds on the foresight of two of UWRA's early leaders, Don Morgan and Don Sanders. Morgan, a long-time United Way professional and former UWRA Board Chair, proposed the idea of an endowment fund in 2000 to honor UWRA founder Gordon Berg. Don Sanders, another United Way veteran and the UWRA Board Chair at the time, joined forces with Morgan to co-chair the first campaign, establishing the UWRA Gordon Berg Endowment Fund in 2001.

An unassuming individual, Gordon dedicated his life to helping others. He began his career as a social worker and cultivated leadership and community building skills by establishing daycare centers throughout St. Paul, Minnesota, to support women entering the workforce during World War II. Gordon later moved to Charlotte, North Carolina, where he served for 23 years as the director for United Way of Central Carolinas. While in Charlotte, Gordon launched the FFTC, building it into one of the largest community foundations in the United States. He served as the organization's Executive Director upon his retirement in 1978 from United Way. In the final chapter of his career, Gordon paved a path for United Way retirees, officially founding the United Way Retirees Association with Chuck Devine in 1990. Berg passed away on July 2, 2005 at the age of 92.

"Anyone can be a philanthropist."

**Gordon Berg,
UWRA Founder**

The UWRA Endowment was launched with seed gifts totaling \$20,000 from the two organizations that were beneficiaries of Gordon Berg's time and considerable talents, FFTC and United Way of Central Carolinas. The fund's inception was bolstered by the generosity of close to 100 Founders who made contributions

to the Endowment in its early years. Included in the Endowment are five Named Funds established by United Way colleagues, friends, and family members who contributed initial and cumulative endowment gifts of \$10,000 or more: Dick and Mary Lu Aft, Tom and Carol Brown, Alan and Selma Cooper, Dan and Kathleen Dunne, and Friends and Family of Bob Beggan. Since its beginnings, the UWRA Endowment has grown at a steady pace and today has over \$225,000 in assets. Endowment earnings provide funding for the organization to launch new programs and to expand and sustain existing initiatives.

As the fund turns 20 years old, UWRA members have another opportunity to commemorate the philosophy of Gordon Berg, who believed "anyone can be a philanthropist." ■

LEADERSHIP CHANGE AT UNITED WAY WORLDWIDE

The Board of Trustees for United Way Worldwide (UWW) issued a press release in February announcing Neeraj Mehta, Chair of the U.S.A. Board, as interim President and CEO of UWW. The statement followed a February decision by former CEO Brian Gallagher to leave his role effective March 1, 2021.

Gallagher described his time with United Way as his "life's work and passion." He also acknowledged, "United Way is at a pivotal moment regarding how to become a more modern organization, including how to truly work together as one network. It's the right opportunity and challenge for a new leader."

According to the Board of Trustees, Mehta will focus on engaging the global United Way Network and guiding UWW's organizational transition and strategic initiatives. Until December 2020, Mehta served as Executive Vice President and Chief Executive Officer of Payment Solutions and Chief Commercial Officer of Synchrony. Prior to joining Synchrony, Mehta held numerous executive roles at GE Capital, including President and Chief Executive Officer of GE Capital, Commercial Distribution Finance.

CHALLENGE GRANT DETAILS

Foundation For The Carolinas will match, dollar for dollar, up to a total of \$10,000 of irrevocable, lifetime gifts received into the UWRA Endowment.

Please join UWRA Board members in doubling the impact of endowment contributions through the challenge grant. As of publication, we have already met 30% of the goal through generous contributions from current and former Board members.

Your gift sustains UWRA's programs and services and honors the United Way system that provided lasting friendships and incredible life experiences that made a difference in the communities you served.

Thank you to former UWRA Board Member Ed John for spearheading this effort.

Visit www.uwra.org/endowment_contribution.html for more information and to make a contribution.

"I am pleased that such an experienced leader as Neeraj has agreed to step into this role during this critical time," said United Way Worldwide Board Chair Dr. Juliette Tuakli. In addition to his business acumen, he is passionate about United Way—our mission and work, and the people who bring this mission to life. I can think of no better person to help us through this transition and provide stability as we forge ahead and shape the United Way of the future."

"I can think of no better person to help us through this transition and provide stability as we forge ahead and shape the United Way of the future."

**Dr. Juliette Tuakli,
United Way Worldwide Board Chair**

The UWW Board has retained Diversified Search to facilitate the search for UWW's next President and CEO. ■



GREETINGS TO UWRA MEMBERS!

From Susan Gilmore (Board Chair, UWRA) and Amber Kelleher (President & CEO, UWRA)

Our families, our communities, and our worlds are in transition. But writer Robbie Shell aptly notes, "Transitions in life can offer opportunities for discovery."

Discovery is a high priority for United Way Worldwide (UWW) as they support the progression to a modern and more connected network under new leadership (cover article) and commit to critical organizational culture and strategy work (page 4). UWW Chief of Staff and UWRA Liaison Brian Lachance acknowledges the considerable change that took place during the past two decades of Brian Gallagher's tenure: the brand was redefined; the network moved to an impact organization and established a global footprint; UWW made a public commitment to become an anti-racist organization; and more. Evolution is constant, and United Way Historian Dick Aft deftly illustrates a number of previous United Way modernizations in his Historical Perspectives article (page 12).

"Transitions in life can offer opportunities for discovery."

Robbie Shell, Writer

UWRA is wrapping up its own discovery process with the strategic planning guidance of Terry Tolan, former CEO of United Way of Kentucky and a current consultant with the Center for Nonprofit Excellence. Terry's experience, leadership, and knowledge about United Way and UWRA have been invaluable. The important challenge for our future will be to operationalize our grand ideas.

During a year of transition that was difficult for so many, there are plenty of "good news" stories—notably the multi-million dollar transformational gifts made by philanthropist MacKenzie Scott to 46 United Ways (page 4). This newsletter also spotlights the accomplishments of United Way of Central Maryland under CEO Franklyn Baker (page 5) and the Age-Friendly efforts championed by United Way of Greater Lehigh Valley-PA (page 6).

At UWRA, our good news includes the opportunity to welcome new Board members and new officers (page 7) to our extraordinary Board of Directors. The matching grant from Foundation For The Carolinas (FFTC) is another welcome gift (cover article). Plus, we are always thrilled to showcase our Member Updates (pages 8 and 9), which includes a special interview with Marian Heard.

True to the spirit of United Way, local organizations are rising to the challenge, adapting to transitions, and continuing the important work in their communities. Likewise, UWRA is committed to working side-by-side with our members, local United Way leaders, and the staff at United Way Worldwide to help us all move forward together. Thank you for supporting our endeavors.

With gratitude,
Susan and Amber

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WELCOME NEW MEMBERS

and those who re-joined after a gap in their membership

- | | |
|--|--------------------------------------|
| Michael J. Brennan (Plymouth, MI) | Herbert Paine (Phoenix, AZ) |
| David Britt (Pineville, LA) | Chris Perry (Waterford Township, MI) |
| Erica Hallock (Spokane, WA) | Kim Scheeler (Port Charlotte, FL) |
| Tracey Holmes (Springfield, VA) | Daniel Spencer (Canandaigua, NY) |
| Mary Jo Koppenhofer (Indianapolis, IN) | Tim Stiles (Hiawatha, IA) |
| Virginia Mason (Gales Ferry, CT) | William W. Ward II (Port Orange, FL) |
| Calvin Morgan (Johns Creek, GA) | |

UPCOMING EVENTS

UWRA Events are a great way to stay connected to your colleagues and the United Way network. Events are open to current UWRA members.

Visit www.uwra.org to register and receive access information.



<p>April - May 2021</p>	<p>(NEW) AGING WELL WITH THE AGING MASTERY PROGRAM™</p> <p>NCOA's Aging Mastery Program™ (AMP) is a playbook for aging well and making the most of the gift of longer life. Following a successful pilot with UWRA's Board of Directors, AMP is now available to UWRA members. Groups of 10-12 will meet over an eight-week period and experience a fun approach to positive aging by focusing on key aspects of health, finances, relationships, personal growth, and community involvement. Email info@uwra.org for more information.</p>
<p>April 5th May 4th June 1st <i>4pm ET</i></p>	<p>MEMBER MASTERCLASSES</p> <p>Part educational but mostly social, these online discussions (re)connect UWRA members with new friends and former colleagues. Each month, one of your fellow members will briefly present a personal passion or reveal a lesser known talent. The remainder of the hour is open discussion.</p>
<p>April 13th <i>3:30pm ET</i></p>	<p>UWRA TOWN HALL WITH UNITED WAY WORLDWIDE (UWW)</p> <p>Interested in hearing what's happening across the United Way network? Brian Lachance, UWW Chief of Staff and liaison to UWRA, is hosting quarterly Town Halls for UWRA members. The featured speaker for April's conversation is Suzanne McCormick, US President for United Way Worldwide.</p>
<p>April 21st May 19th June 16th <i>3pm ET</i></p>	<p>HISTORY HANGOUTS</p> <p>History Hangouts are an opportunity for current and former United Way colleagues to come together to reminisce and recollect different aspects of United Way history. Zoom calls are held on the third Wednesday of each month by Dick Aft, United Way Historian and UWRA Emeritus Board Member.</p>
<p>April 22nd <i>12pm ET</i></p>	<p>(NEW) INFORMATION SESSION - INTERIM EXECUTIVES ACADEMY</p> <p>UWRA is partnering with the Third Sector Company to offer an Interim Executives Academy, which includes 16 hours of immersion training on interim leadership over an 8-week period this fall. Academy participants will discover the strategic nature of transitional leadership and learn how to negotiate the interim engagement. Email info@uwra.org to join the Information Session, learn more specifics about the curricula, and get your questions answered.</p>
<p>May 24th <i>3pm ET</i></p>	<p>UWRA OVERVIEW FOR NEW(ER) MEMBERS</p> <p>(Re)connect with fellow UWRA members, discover the benefits of your membership, and learn about the important work UWRA is leading. Content is aimed at new(er) members, but the overview is open to all members.</p>
<p>September 21-25 <i>Louisville, KY</i></p>	<p>UWRA GATHERING</p> <p>Joe & Terry Tolan are awaiting the 'all clear' signal to host the next UWRA Gathering in their home community of Louisville, Kentucky. It promises to be a fantastic itinerary filled with racing at Churchill Downs, a river cruise on the Belle Louisville, a tour of the Louisville Slugger bat factory and baseball museum, visits to bourbon distilleries, and much more. Hold the September dates; a Go/No Go decision will be made in early July.</p>

PHILANTHROPIST MACKENZIE SCOTT MAKES TRANSFORMATIONAL GIFTS TO UNITED WAYS



In the last four months of 2020, philanthropist MacKenzie Scott made \$4 billion in gifts to 384 organizations across all 50 states, Puerto Rico, and Washington, D.C. Forty-six local United Ways were recipients of Scott's transformational philanthropy. These once-in-a-lifetime gifts are strengthening foundations for United Ways to reimagine and rebuild their communities in ways that will be life-changing for millions of people. ■

- Capital Area United Way (Baton Rouge, LA)
- Heart of Florida United Way (Orlando, FL)
- Metro United Way (Louisville, KY)
- Mile High United Way (Denver, CO)
- United Way Bay Area (San Francisco, CA)
- United Way California Capital Region (Sacramento, CA)
- United Way de Puerto Rico
- United Way for Southeastern Michigan (Detroit, MI)
- United Way of Berks County (Reading, PA)
- United Way of Broward County (Fort Lauderdale, FL)
- United Way of Central Indiana (Indianapolis, IN)
- United Way of Central Maryland (Baltimore, MD)
- United Way of Central Massachusetts (Worcester, MA)
- United Way of Central New Mexico (Albuquerque, NM)
- United Way of El Paso County (TX)
- United Way of Genesee County (Flint, MI)
- United Way of Greater Cincinnati (OH)
- United Way of Greater Greensboro (NC)
- United Way of Greater Knoxville (TN)
- United Way of Greater Los Angeles (CA)
- United Way of Greater Milwaukee & Waukesha County (WI)
- United Way of Greater Nashville (TN)
- United Way of Greater Philadelphia and Southern New Jersey
- United Way of Greater Rochester (NY)
- United Way of Greater St. Louis (MO)
- United Way of Metro Chicago (IL)
- United Way of Miami-Dade (FL)
- United Way of Northeast Florida (Jacksonville, FL)
- United Way of Northern New Jersey (Morristown, NJ)
- United Way of Palm Beach County (FL)
- United Way of Racine County (WI)
- United Way of Rhode Island
- United Way of San Antonio and Bexar County (TX)
- United Way of South Hampton Roads (Norfolk, VA)
- United Way of Southeast Louisiana (New Orleans, LA)
- United Way of Southern Cameron County (Brownsville, TX)
- United Way of Southern Nevada (Las Vegas, NV)
- United Way of Southwest Louisiana (Lake Charles, LA)
- United Way of the Columbia-Willamette (Portland, OR)
- United Way of the Greater Capital Region (Albany, NY)
- United Way of the Greater Triangle (Durham, NC)
- United Way of the Midlands (Columbia, SC)
- United Way of the National Capital Area (Washington, D.C.)
- United Way of Tucson and Southern Arizona (AZ)
- United Way Suncoast (Tampa, FL)
- Valley of the Sun United Way (Phoenix, AZ)

UPDATE FROM UNITED WAY WORLDWIDE

By Brian Lachance, UWW Chief of Staff and Liaison to UWRA



In March, we said goodbye to Brian Gallagher as he concluded his nearly 40-year United Way career. He started as a college-age intern, became a great fundraiser and impact professional, provided leadership at a number of local United Ways, and served as CEO of United Way of America and then United Way Worldwide.

Saying goodbye to Brian brings to mind the countless other friends and colleagues who have come and gone before and since my time with United Way. It's a good time to think about the giants I never knew personally, but whose shoulders I stand on still today. Some of you reading this newsletter are those giants. Together, United Way professionals walk a well-trodden path upon the innovation and entrepreneurial spirit of our predecessors. We wouldn't be able to rise to today's challenges, if not for the foundation that was laid before us and reinforced over the years.

And challenges are not lacking right now. The last 12 months have not been easy for United Way. We all continue to grapple with the effects of the COVID-19 pandemic, the complex and systemic issues facing every community, economic stresses for all United Way organizations, and media attention concerning culture and equity practices at United Way Worldwide. Any one of these challenges would be enough to create uncertainty and chaos, yet we're facing them all at the same time.

It's a good time to think about the giants I never knew personally, but whose shoulders I stand on still today.

That said, we cannot lose sight of the extraordinary work United Way accomplished in 2020. The amount of money we raised for COVID-19 relief funds, the tremendous work of 211, and the on-the-ground response to economic and social challenges in communities across the globe are just a few of the many highlights. That success demonstrates, once again, the strength of United Way. It validates how much we are trusted by others when we work together, share a common goal, and put into action best practices that have been handed down over the decades, while also exploring new, innovative solutions and partnerships.

And we're still on track. With our eyes on impact, we are ready to pivot from "response" to "rebuilding" in the wake of the pandemic. Our continued focus on culture and equity practices remains a top priority. The UWW board is forming two task forces populated by local United Way leaders and UWW professionals. One will build on the great culture work we've done, especially over the last five years; the other will reimagine our business strategy. Both aim to strengthen all of us with in the network.

There is no denying we have a hard road ahead. With our knowledge of the past to support us, and a fearless approach to the future, we can climb more mountains, forge new paths, and ensure we are there to bolster stronger communities for the next generation. ■



MEET FRANKLYN BAKER

President & CEO of United Way of Central Maryland

UWRA: Please introduce yourself and take us through your journey with United Way.

Franklyn: I'm Franklyn Baker, President and CEO of United Way of Central Maryland in Baltimore. I have dedicated my career to the nonprofit sector. My previous experience encompasses leadership roles for both local and national organizations, including Greenpeace USA, Volunteers of America, and Children's National Medical Center.

I joined my local United Way in 2016 and was thrilled to be able to build upon its strengths and successes, especially its "from every angle" approach to driving family stability and broadening and deepening our impact across central Maryland. This position is a perfect fit for me—I am deeply committed to equity, diversity, and inclusion in community building and breaking down barriers to drive positive change.

What energizes me most about my job is the constant change. Shortly after I started, we moved our headquarters from downtown Baltimore to an office building located in a community of need in Southwest Baltimore. The move was intentional—it provides significant savings to our operations that we can direct back to our residents and neighborhoods and places us directly in one of the many communities we serve.

This position is a perfect fit for me—I am deeply committed to equity, diversity, and inclusion in community building and breaking down barriers to drive positive change.

Since coming aboard, we've evolved both our program model and business model. We're incubating new ideas and accelerating best practices that address root causes of poverty. We target hardworking families that may be working two or more full-time minimum wage jobs, but who still struggle to afford basic needs. We've added more family stability sites that provide homelessness prevention and shelter diversion services to families in locations across central Maryland, expanded our Neighborhood Zones (resource and service hubs for challenged communities that address education, income, housing and

health), and expanded our On Track 4 Success early intervention education program that helps children succeed in school with the goal of graduating. Our first ALICE® (Asset Limited, Income Constrained, Employed) Report was released early in my tenure. I am a staunch advocate of sharing its findings with our partners, donors, legislators, corporations, foundations, and the media to increase awareness of and remove obstacles for hardworking families who cannot afford the basics in life. I'm also passionate about exceeding goals: In addition to our annual fundraising campaign, we also surpassed our target of raising an additional \$4.5 million to help struggling families and individuals and to improve the effectiveness of our operations

UWRA: Describe what the past 12 months have been like for you, your community, and your United Way.

Franklyn: Where to start! It's been a year unlike one that any of us has ever experienced, and it's taken its biggest toll on those who were already struggling. I'm proud of the United Way team here and how quickly we pivoted to respond to the cascading needs resulting from the pandemic. We immediately established a COVID-19 Community Fund, which to date has raised nearly \$3 million to help our neighbors, neighborhoods, and other nonprofits and organizations impacted by the pandemic. The ever-increasing need—and the new needs that emerge every day—have certainly been challenging. Still we have mobilized all of our resources and worked closely with State government and new and existing partners to provide more of what's needed, where it's needed, and when it's needed. You can read more about our response here: uwcm.org/covidresponse.

UWRA: What keeps you going?

Franklyn: My team keeps me going! They are an incredible group of talented, mission-driven professionals whose deep and abiding commitment to serving others aligns well with my own ethic, sustains me during challenging times, and is reaffirmed with each one of our successes. 2020 was certainly a rollercoaster ride, but seeing the outpouring of support from our community and the incredible dedication, commitment, and around-the-clock work of our staff, volunteers, board members, and others to address the ongoing and emerging challenges facing our region gives me hope and is truly inspirational.

UWRA: What accomplishments are you most proud of for 2020?

Franklyn: There are so many 2020 accomplishments to celebrate, and you'd need an entire newsletter devoted to them. Still, I'd

say I'm most proud of the fact that when the pandemic hit, we were already in a position of strength and could quickly and effectively respond to the challenges of the pandemic and rapidly make a measurable difference for those in need.

We value the wisdom that exists in abundance within the UWRA membership.

I've also been proud to launch robust Equity, Diversity, and Inclusion initiatives that support our team and the community. And the cherry on top? An unsolicited and undesignated \$20M gift—the largest individual gift in our 96-year-history—from philanthropist MacKenzie Scott. Our strategy and proven ability to deliver positive, meaningful results, and our strong and thoughtful plan for our future work, were driving factors in her decision to award this transformational gift, which will significantly amplify our ability to help even more people

UWRA: United Way of Central Maryland has been a long-time supporter of UWRA (thank you!). Why has it remained a priority to provide that annual gift?

Franklyn: While I'm newer to the United Way family, the careers of so many of my team members and colleagues have been shaped by mentors who are now part of UWRA. We want to support the success of those who have supported our professional success. We value the wisdom that exists in abundance within the UWRA membership.

UWRA: Can you talk about your efforts to engage retirees in your own community?

Franklyn: So many times, our minds gravitate toward traditional campaign engagement opportunities for retirees. On the other hand, we have a cadre of the female pioneers who initially shaped our Women United membership group. These seasoned "alumnae" and leadership givers are retired C-suite professionals who are still connected to us and serving in multiple ways, from giving to mask making and mentoring.

UWRA: Anything else you would like to add?

Franklyn: I know I mentioned that one of our greatest accomplishments of 2020 was being well-positioned to help families and individuals to respond, recover, and rebuild from the pandemic. But on a personal note, one of my wife and I's most significant achievements is rearing a lovely daughter who is a well-mannered, bright 18-year old freshman at Loyola University Maryland. Young people like her offer great hope for our future. ■

SPOTLIGHTING SUCCESS IN THE NETWORK

LEHIGH VALLEY: A PLACE FOR ALL AGES

This feature story is an extension of UWRA's Aging in Place research conducted in 2019, funded by a grant from the Cinda A. Hallman Memorial Fund, which addresses two of the recommendations made by UWRA:

- 1) Amplify United Way's commitments to older adults, and
- 2) Drive knowledge sharing across the United Way network.

UWRA is excited to spotlight United Way of the Greater Lehigh Valley's work in making their community more accessible and inviting to people of all ages through their Age-Friendly Lehigh Valley initiative.



WHAT IS AN AGE-FRIENDLY COMMUNITY?

Age-friendly communities treat all residents and visitors with respect, regardless of age, income, or physical ability. They are accessible, equitable, inclusive, safe, secure, and supportive.

They keep individuals socially connected and engaged in community life, and they enhance opportunities to be healthy and active.¹ Simply put, age-friendly

communities are inviting to everyone – whether you're 5 years old and being pushed in a stroller or 105 years old and using a walking cane.

Importantly, age-friendly communities foster connectivity among people and can improve the mental and physical health of everyone, especially older individuals. An age-friendly environment reduces the risk of falls and helps prevent social isolation by increasing environmental safety, security, and protection of older people.



In 2020, Age-Friendly Lehigh Valley adjusted its approach to addressing relevant issues around racial justice, inequity, and, of course, COVID-19. They refocused to meet urgent needs and shifted their perspective to make sure they were inclusive and mindful of all people in their communities.

"With so much change in the social and political landscape, we knew we needed to take a step back and reassess," says Carmen. "By doing so, we made sure we remained both respectful and relevant."

With this in mind, Age-Friendly Lehigh Valley has developed a set of core initiatives designed to meet the needs of the whole individual and the whole community. These initiatives are:

- **Advocacy and Awareness:** Support policies, programs, and social movements that promote equity and inclusion of all people, no matter their age.
- **Communication and information:** Distribute information across a variety of digital and traditional channels, so residents have the resources they need to live an accessible, engaged, informed, and enjoyable life.
- **Dementia awareness:** Increase awareness and community support of dementia.
- **Health equity and food access:** Improve access to healthcare and nutritious food; increase awareness of the Supplemental Nutrition Assistance Program; increase awareness of the health risks associated with diabetes and falling.
- **Housing:** Improve housing options for older adults and the homeless.
- **Transportation accessibility:** Increase awareness of transportation opportunities, improve transportation access for all people, and educate communities on how to transition from independent driving to other modes of transport.

AGE-FRIENDLY LEHIGH VALLEY: ACCESSIBLE TO ALL

In 2018, Lehigh and Northampton counties became the first dual-counties to join the World Health Organization/AARP Network of Age-Friendly Communities. Carmen Bell, Director of Healthy Aging at United Way of the Greater Lehigh Valley (UWGLV), is spearheading the age-friendly initiative on behalf of UWGLV.



"What Carmen is doing is pushing forward systemic change—a challenging task," says Erin Connelly, UWGLV Senior Director of Impact. "Whether it's funding agencies, convening people, or simply encouraging individuals to reach out

to their neighbors, Carmen is persistent and resilient in pushing this cause forward. It's the type of work we need to move the needle in the right direction for our community."

Much of the Age-Friendly Lehigh Valley work is based on direct input from older adults. The team has conducted "listening tours," surveyed community members, organized and attended events, and collaborated with other organizations to better understand the needs of older adults.

"Almost 16% of the population in Lehigh and Northampton counties is 65 or older, and that number is increasing," Carmen says. "We saw a need to reach out to this population and make sure they have the resources they need to live healthy and happy lives."

"Based on what we heard, we decided to fund programs specifically around transportation, case management in the home, chronic disease care, meal services, and grocery shopping services. These were things that older adults said would help them safely age in place, manage their health, and go about their daily tasks with ease."

Over the past few years, the organization has distributed millions of dollars in funding for healthy aging programs and initiatives.

For more information visit: <https://www.unitedwayglv.org/agefriendlylehighvalley>

- **Volunteer check-in/social connectedness:** Work with local organizations to increase social opportunities and build stronger networks for older adults – through actions as simple as a phone call. Age-Friendly Lehigh Valley has made more than 2,000 phone calls to older adults in the past several months.
- **Walking teams:** Encourage and promote the mental, physical, and social benefits of walking outdoors.

Age-Friendly Lehigh Valley continues to work on its cornerstone initiatives while taking into account the challenges posed by COVID19. Additionally, Carmen reports that she has had the opportunity to connect with other United Way organizations and community partners to continually improve her program and inspire others to undertake age-friendly initiatives. ■

LEARN MORE ABOUT AGE-FRIENDLY LIVING

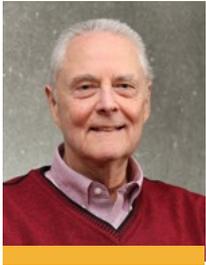
To support age-friendly living in your area:

- Advocate for housing affordability and choice.
- Engage people of all ages in community planning.
- Look for ways to engage older adults as volunteers, entrepreneurs, or contributors.
- Promote houses, parks, buildings, and walkways.
- Support a range of transportation options.

UWRA WELCOMES NEW BOARD MEMBERS

Join us in welcoming our newest UWRA Board members Robert “Bob” Ferriday III and Robert Hines. Bob and Robert add rich leadership experience to the UWRA Board as we embrace strategic initiatives and growth in 2021.

Robert “Bob” Ferriday



UWRA: Tell us about yourself.

Bob: I was born and raised in Indiana and earned a BS in Business from Purdue University. I completed my MBA from The Ohio State University while serving in the Air Force in Dayton, OH. In 1964, my late wife Sally, three young

daughters, and I moved to Milwaukee. I spent the next 13 years of my career with Globe Union. The game-changer came in 1977 when I responded to a blind job posting that turned out to be a position with United Way of Greater Milwaukee (UWGM).

Family has always been most important to me. My wife Barbara and I were long-term good friends and both widowed. We married in 2003 and continue to share in the joy of our big extended family, including our six children, 18 grandchildren, and one great-granddaughter.

UWRA: Describe your history with United Way.

Bob: I retired from the Milwaukee United Way in 2003, after serving 25 years as CFO and Operations Director working with four CEOs. It was a remarkable journey. I enjoyed learning about this caring business and will always cherish the relationships built with volunteers and staff.

Significant highlights during my time with United Way include growing resources, introducing new technologies, and finalizing a new UWGM headquarters site in a vacated Schlitz brewery. Participating in a four-community collaborative technology initiative to build out an electronic campaign information system to expand our reach and streamline giving was significant, too. After retiring, I returned on a part-time basis to head up a planned giving initiative where we secured a million-dollar foundation honorarium gift.

My years with United Way instilled a love for service and my community. I currently volunteer

with several United Way funded agencies and other organizations close to my heart.

UWRA: How did you come to know UWRA, and how have you been involved?

Bob: Other senior staff at our United Way were members of UWRA, so it was natural for me to join the association. The benefits of membership are immeasurable. My wife and I have enjoyed five UWRA Gatherings over the years. I highly recommend that other members take advantage of these great social and educational meetings.

UWRA: What are you looking forward to most about serving on the UWRA Board?

Bob: I look forward to learning from and collaborating with my fellow Board members through our formal meetings and committee assignments. It is nice to be working towards a mission with so many knowledgeable United Way professionals. ■

Robert Hines



UWRA: Tell us about yourself.

Robert: I served six years in the United States Navy before being recruited by Amoco Oil Company (now BP Oil), where I spent 20 years of my professional career in various executive roles. My family and I moved

seven times and lived in almost every region of the country during that time.

While living in Scottsdale, AZ, I was recruited to become President of the Upward Foundation, a school for K-12 special needs children. This opportunity was my initial introduction to working in the philanthropic world and led to my professional tenure with the United Way.

UWRA: Describe your history with United Way.

Robert: A United Way colleague invited me to assist with a unique project for the United Way in Albany, NY. As I was leaving Albany at the end of the project, I was offered the position of Campaign Director and humbly served in that role for three years.

In 2004, I was selected as the fourth President & CEO of United Way of Cumberland County in Fayetteville, NC, where I served for sixteen years, retiring in July 2020.

My time in Fayetteville filled me with such a sense of purpose and belonging. My proudest accomplishments include launching the Dolly Parton Imagination Library (which delivered nearly a half-million books to children in our community over the past 15 years) and collaborating with the Cumberland County School District on the Character Playbook (which helps students cultivate and maintain healthy relationships). The most lasting accomplishment

of my tenure will undoubtedly be the United Way of Cumberland County Endowment. We invested \$25,000 from our reserve account in 2004, and the investment is now valued at nearly \$300,000.

UWRA: How did you come to know UWRA?

Robert: United Way of Cumberland County has been a supporting member of UWRA since 1995. I have been a Leadership member since 2017. In 2019, I participated in the UWRA Gathering in Washington, DC, where I had the opportunity to reconnect with and meet many other members.

UWRA: What are you looking forward to most about serving on the UWRA Board?

Robert: I am enjoying the strategic planning process, including my assignment to the Engagement committee. I also look forward to sharing our mission and vision by recruiting more UWRA members and enlisting additional support from local United Ways. ■

2021 UWRA BOARD OF DIRECTORS

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SPOTLIGHT ON MARIAN HEARD: A UWRA MEMBER UPDATE

UWRA: In what roles have you served during your United Way years?

Marian: I began my 30-year United Way career in 1974 as the childcare coordinator for United Way of Eastern Fairfield County (UWERC) in Bridgeport, CT. With UWERC, I served as the Associate Executive Director, Executive Director, President, and Chief Executive Officer. The title of President and Chief Executive Officer was rare in those days! In 1992, I joined The United Way of Massachusetts Bay in Boston (UWMB) as the President and CEO. I also served as CEO of the United Ways of New England. I retired from United Way in July 2004.

UWRA: What were some of your early successes?

Marian: UWERC was chosen as the best United Way program in America and featured in the annual Presidential Message delivered by President George H.W. Bush. We were honored for our "Regional Youth Substance Abuse Prevention" initiative. I was blessed with a great staff, a very involved board, and a fantastic group of volunteers, which allowed us to earn this type of recognition.

Another successful venture was our Alexis de Tocqueville efforts. I had my broker buy 1-5 shares of stock of every public company in our area, and I would take the annual reports with me when meeting CEOs and "encourage" them to increase their giving, host dinners, or help by recruiting others. Also, whenever a local couple was featured in *Architectural Digest* or another national magazine, I personally made cold calls to confirm their willingness to host a United Way dinner – and, **they all said yes!**

UWRA: You have worked with several U.S. presidents. Can you elaborate on some of those experiences?

Marian: Early in my tenure, Bill Aramony suggested I represent the United Way with President George H.W. Bush's "Thousand Points of Light." I agreed to meet with philanthropic giant Raymond G. Chambers, the chairman of this newly formed foundation. We discussed our thoughts about childcare in America, youth development, and the importance of volunteers. The following week, I was invited

to the White House to talk about being the founding President and CEO of the Points of Light Foundation.

I accepted a three-month position, which turned into almost a year. During this hectic time, UWERC surpassed campaign goals and received six awards for community leadership and programming. We were invited by President George H.W. Bush to meet him in Westchester as he arrived on Air Force One. My husband, the board chair, the incoming board chair, and the campaign chair attended. This meeting led to a long-standing relationship with the Points of Light Foundation.

I have now worked with six United States presidents: Gerald Ford, Jimmy Carter, George H.W. Bush, Bill Clinton, George W. Bush, and Barack Obama. With board support, I took a leave of absence to serve as the President and CEO of the Presidents' Summit for America's future. Presidents Bush and Clinton were the co-chairs, and retired General Colin Powell was the honorary chair. First Lady Hillary Clinton also played a prominent role.

UWRA: Who were your mentors?

Marian: My mentors included George Wilkinson. He demonstrated how critical it was to focus on research and data analysis as a part of our reports and presentations. That served me well!

One of our innovative programs was the Ambassador's Circle. The first Chairman was Oz Nelson, the CEO of UPS. Our first speaker was Jack Welch, CEO of GE. That was a fateful meeting, because Jack became my mentor. From Jack I learned the concept of wild-card planning and "how to plan" for success. Jack continued to be my mentor when he moved GE's world headquarters to Boston. I could write another book about Jack's words.

During 2018, we lost my great friend and long-term supporter, President George H.W. Bush. During 2020, both Jack Welch and Ed Ansin, another mentor, passed away. I feel blessed to have had these and many, many others in my life.

UWRA: Tell us about your time in Boston.

Marian: In 1992, I was asked to take over at The United Way of Massachusetts Bay in Boston (UWMB). Bill Aramony has just resigned amid an internal investigation and unfavorable news reports about the misuse of funds. To help reset the trajectory of the situation, Ray Chambers, a tremendous supporter and friend of mine, asked me the amount of the largest gift in Boston's history. I confirmed it had been \$35,000. Ever generous, Ray sent a check for \$50,000 and asked me to tell the Boston United Way Board that someone they didn't know believed in me and offered this gift as a vote of confidence. From there, we simply got down to business!

After the deluge of media stories with brutal headlines, we lost donors left and right. I invited

one critical media reporter to visit two childcare sites and one senior program funded through UWMB. That trip turned the tide. The reporter and I met regularly, and the tone of the stories changed because he witnessed the powerful impact United Way was making in the community.

During my time in Boston, we also had great legislative success. Our leadership resulted in the passage of bills to support childcare for those in job training programs and license plates to support children. We also passed bills on healthcare for over 165,000 children. I fondly remember walking with 165 children through the state house halls and into the chamber to make our point. Each child carried a cut-out that represented one thousand children.

In Boston, our first million-dollar donor was Martha Crowninshield. Her gift sparked our efforts and led to other major contributions. We completed an endowment campaign in record time, building reserves of over \$30M to see us through tough times. The Boston United Way moved from #87 to the #1 position in America in the Tocqueville Society.

UWRA: What keeps you busy these days?

Marian: My husband and I have been married for 58 years. We enjoy traveling and spending time with our children and grandchildren.

I stay busy as the President and CEO of Oxen Hill Partners, a company focused on strategic initiatives and corporate and personal services. We represent prominent companies, including law firms and the hospitality industry. I have served on many corporate and nonprofit boards, stayed active at our church, and continue writing music for charity. Also, I have become an abstract artist, with a studio near the Boston Common.

I spent several years touring the country with Bishop T. D. Jakes of Dallas, speaking about leadership and goal achievement. I have written two books and have delivered many commencement addresses for colleges.

UWRA: Your list of honors and awards is deservedly long. What are some that stand out to you?

Marian: I have been honored with 116 awards and citations, including 21 honorary doctorate degrees. I am currently serving as chair of my eleventh corporate board and have been inducted into the National Association of Corporate Directors' Hall of Fame.

In both Connecticut and Massachusetts, I was the first woman and first African American to be named President and CEO. These appointments generated a lot of press and high expectations for me. I am happy to say, with my team, we exceeded each goal and expectation. I am most proud to have had candid conversations about "race and place" with United Way leadership. I often say, "it is an honor to be the first. However, I vow to work hard not to be the last." ■

Scott Badesch (Silver Spring, MD)



I started my United Way career in 1985 with the then called United Way of Suburban Chicago (now part of the United Way of Metropolitan Chicago). From there, I went to serve as the President and CEO of the United Way of South Carolina

before serving as President and CEO of the United Way of Palm Beach County. Altogether 24 years!

I had no plans on leaving United Way until 2008 when I received a call asking about my interest in working for the Autism Society of North Carolina. My wife and I have four adult children, and our oldest son Evan is autistic. The job was intriguing to me since I was impacted by autism (through my son), and I knew of the ongoing discrimination and denial of opportunity my son faces each day because

he is autistic. I decided to make the move to the Autism Society and ultimately became the President and CEO of the Autism Society of America until my retirement in 2020, right before the pandemic. I truly enjoyed my work with United Way, and from what I learned through United Way, I was a much better CEO with the Autism Society.

My wife Phyllis and I now live in Silver Spring, Maryland, where we are waiting out the pandemic. Once it is over, we plan to take a road trip through the United States and possibly Canada. I am enjoying mentoring a few young professionals (I learn so much from them) and serving on the board of directors of the Autism Science Foundation. We also have two beautiful grandsons living in Chicago, so we get back there often. We enjoy spending quality time with our four adult children. I also enjoy taking long walks, binge-watching various shows, and just relaxing and fully enjoying life.

If anyone is interested in learning more about autism, which now impacts one out of every 54 children, or needs help or advice regarding autism, go to www.autism-society.org. April is Autism Awareness Month. ■

Mary Tyler (Englewood, OH)



I retired from United Way in 2009 after 25 years of a rich and fulfilling career, beginning in Dayton (OH) and concluding as the CEO of the United Way of Gaston County (NC). My other United Way stints included

Modesto (CA), Baltimore (MD), and Winston-Salem (NC).

During my career, I served in various leadership roles within the Diversity and Inclusion Council. My nonprofit knowledge and expertise became the platform I drew upon to develop and teach college-level nonprofit classes and workshops, and also serve as a consultant to nonprofit organizations, the faith community, and universities.

In 2011, I returned home to Dayton and led The National Conference for Community and Justice of Greater Dayton (NCCJ), which provides diversity and inclusion education and programs to empower current and future community transformation leaders. I served in that role until 2019 and retired again, returning to consulting.

These days, I spend my time conducting county-wide equity listening sessions, facilitating professional development opportunities, and engaging the community due to the 2020 social unrest many communities experienced. I am active in local police reform work and a regional equity initiative to bring social and economic balance to underserved individuals and families.

Family is very important to me. I am the proud mother of two caring adult children and proud grandmother to seven bright and active grandchildren and four great-grandchildren. In my spare time, I study interior design (avid HGTV fan!), enjoy gospel and country music, participate in country line dancing, and love getting together with family and friends. ■

MEMBER BENEFITS



Attend UWRA's in-person and online events

<https://www.uwra.org/events.html#/>



Receive the UWRA Updates newsletter, published three times each year



Join Workplace, the online community for UWRA members

<https://unitedway.workplace.com>



Receive twice-weekly Breakfast emails from United Way Worldwide



Access UWW news, resources, and templates on United Way Online (UWO)



Search job postings across the United Way network



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

REMEMBERING FRIENDS



Wayne Davis

Wayne Ray Davis, age 86, passed away on December 16, 2020.

After graduating from Clemson University, Southeastern Baptist Seminary, and NC School of Social Work, Wayne began a life dedicated to serving his community. Early on, he was a Baptist minister (in NC and SC) and the Director of Union County Department of Social Work (Monroe, NC). He spent the rest of

his career with United Way. His roles included Director of Planning and Allocation in Charlotte (NC), Executive Director of United Way of South Carolina, Vice President of the Southeast Region for United Way of America, and President and Chief Professional Officer of United Way of Tampa (FL). Wayne was also a long-time UWRA member and served as a member of the UWRA Board of Directors.

Friends remember Wayne as one of Clemson Tigers' biggest fans. He spent his retirement as an appointed Guardian Ad Litem for abused and neglected children.

Wayne is survived by his wife of 65 years, Betty Bryant Davis, their three daughters and spouses, six grandchildren, and seven great-grandchildren. His greatest joys came from spending time with his family. ■



Carlos Everett Lee

Carlos Everett Lee, age 93, passed away on August 26, 2020. Carlos was born in Hammond, Indiana, and spent most of his childhood in South Baldwin County, Alabama. He was a graduate of Alabama Polytechnic Institute (Auburn) and completed post-graduate work at the University of California, Berkeley.

Carlos spent the majority of his professional career with American Red Cross and United Way. In the years working with

United Way, the family lived in Norfolk, VA; Atlanta, GA; and Dothan, AL. He retired in 1992 as President and CEO of Wiregrass United Way in Dothan. Following his retirement, Carlos remained a part of United Way through his active membership with UWRA.

Dedicated to service, Carlos served in the U.S. Navy during World War II. He was an active member of the Dothan Rotary Club (a Paul Harris Fellow), a Board Member of Dothan Area Botanical Gardens, and Sons of The American Revolution. He enjoyed flower gardening, woodworking, playing bridge, square dancing, and swimming.

Carlos is survived by his beloved wife of almost 19 years, Julia Kelley Lee; two daughters; two grandchildren; four great-grandchildren; and numerous and beloved extended family members. ■



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.

AVOID INCOME TAX ON YOUR IRA REQUIRED MINIMUM DISTRIBUTION

As a reminder, annual withdrawals from traditional retirement accounts are required after age 70 ½ (or age 72, if your 70th birthday is July 1, 2019 or later). Skipping a required minimum distribution will result in a penalty of 50% of the amount that should have been withdrawn.

You can avoid income tax on your required withdrawal by donating your money directly to a qualifying charity, such as the United Way Retirees Association. Many UWRA members already take advantage of this tax savings.

Visit irs.gov/retirement-plans/ for up-to-date information regarding tax information for your retirement plans.

POWER OUR FUTURE

An Endowed Leadership Gift sustains your UWRA membership in perpetuity. Please join UWRA members who have acknowledged their United Way career by making an endowment contribution. It only takes twenty-five times the amount of your annual gift to establish a legacy contribution and help sustain UWRA's future. Donations can be made in any amount over an extended period of time.

Contact info@uwra.org for more information about UWRA's endowment, or simply direct a contribution to:

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Please notify info@uwra.org if you notice information that needs to be updated.



TODAY'S MODERN UNITED WAY CONTINUES A HISTORY RICH WITH MODERNIZATIONS

By Dick Aft, United Way Historian and UWRA Emeritus Board Member

In 1887, Mrs. Frances Jacobs brought together a small group of clergymen to help her convene Denver's business and civic leaders.

They all shared a concern about the multiplicity of charitable fundraising campaigns and its cost to services. Adapted from an 1860's English invention, the Charity Organization Society created in Denver was not just unique. In its day, it was termed a *modern way* to increase the efficiency of fundraising among competing agency campaigns.

In 1913, Cleveland's business and civic leaders created the Federation for Charity and Philanthropy to decrease competition and increase efficiency in social agency resource development. It is cited in

People & Events, a History of United Way as the first *modern* United Way.



Frances Wisebart Jacobs

From a historical perspective, United Way's many modernizations have been less

about coping and more about adapting in order to "keep making a difference, every day."

1914 and 1941, world wars prompted American Community Chest leaders to modernize their fundraising and fund distribution approaches to include nonprofit agencies meeting wartime needs in the United States and abroad.

Following World War II, Detroit Community Chest leaders introduced a *modern* United Way, as it shifted fund distribution responsibilities from recipient agency representatives to committees of citizen volunteers.

In the late 1950s, *The Milwaukee Journal* heralded the merger of the local Welfare Planning Council and Community Chest into the first United Community Services organization as a *modern* community organization.

In 1970, United Community Funds & Councils of America labeled its modernization to United Way of America as a "rebirth and renewal." Late in the 20th century, the United Way of Minneapolis created "vision councils." These diverse stakeholder committees were responsible for investing campaign proceeds in agency programs and services that promised to achieve measurable improvements in

the health, education, and financial stability and people in need of funded services. This modernization of the Minneapolis United Way allocations process led to the United Way's 21st century focus on impact.

Right now, exciting modernization efforts are underway as the United Way network explores ways to consolidate backroom operations, enabling local United Way organizations to focus their energy on the critical impact work needed in their communities.

What do all of these modernizations have in common? Each built upon the foundation created by their predecessors by adapting business models to their changing environments. Each has remained true to the mission of increasing the capacity of people to care. Each has adapted to changes in social conditions, human needs, donors, and technology. Each has striven to increase United Way's effectiveness and efficiency.

Each modernization built upon the foundation created by their predecessors by adapting business models to their changing environments.

Many institutions modernize to cope with change. From a historical perspective, United Way's many modernizations have been less about coping and more about adapting to "keep making a difference, every day," as our 1970's slogan said. Ed Deming didn't have United Way in mind when he conceived of "continuous improvement." That was probably because we called it "modernization." ■

References:

Colorado Givers, by Thomas J. Noel, Stephen J. Leonard, and Kevin E. Rucker (1998)
People & Events, United Way of America (1977)

Special thanks to Jim Yu, Director of Technology Engagement for United Way Worldwide, for researching and supplying background on the current "Modern United Way" efforts.

United Way



United Way Retirees Association

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