



NEXT

WELCOME TO

UNITED WAY NEXT

ISSUE 4 • MAY 2022



A New Name: United Way NEXT

"A community of United Way leaders."

United Way NEXT is a veritable "who's who," a diverse community of United Way leaders who understand what it takes to move ideas and mindsets to the next level. United Way NEXT members are peers, mentors, colleagues, and friends who thrive on staying connected, informed, and helpful.

Our organization is here so that United Way leaders have a place to network, listen, lead, inspire, and give back. We combine our strengths to keep United Way's impact moving forward.

All good stories start at the beginning.

United Way Retirees Association began in 1990 with a primary goal to enrich the lives of our members by helping them stay connected and use their skills and talents to help United Ways serve their communities.

Over the next 30 years, UWRA has had relatively slow but steady growth. Our enduring strengths have been our ability to keep colleagues connected, provide ongoing information about the United Way network, and provide opportunities to contribute skills and experience with local United Ways.

In a 2020-member survey, the top opportunities cited for our future was to grow the membership and expand our connection and contribution to the United Way Network. Thus in 2021, UWRA

embarked on a branding journey and, after extensive professional strategic planning and research, we developed the following goals:

1. Clear and compelling messaging to convey our core value propositions.
2. A name that would feel inclusive and vital for all our members:
 - **Retirees**– Spent most of their working career with United Way and are retired
 - **Alumni**– Worked for United Way for a number of years, then moved on yet valued their experience
 - **Current Employees** - Still working with UW who wish to stay connected with alumni and retirees
 - **Local United Ways** and **State Orgs** who recognize the value of this knowledge reservoir and want to benefit from it.
3. Position us as an exciting and valuable organization utilizing the expertise, wisdom, and generous skill-sharing of our members.
4. Beyond a way to connect, add a focus on the opportunity to give (time, talent, advice, support, etc)!

At the end of the day, United Way NEXT members are seen as a way of harnessing talent and mobilizing knowledge for tangible purposes.

"Making connections. Making a difference."

What's NEXT?

How do I NEXT want to connect?

How do I NEXT want to learn from and with this amazing group of people?

How do I want to stay informed about what is next happening in the United Way network?

How do I NEXT want to contribute and give back for the betterment of my friends, colleagues, United Way, and my greater community?

As a current leader, how do I next get help for me and my United Way from people who have experience and expertise?

How do we next preserve and transfer the knowledge and commitment from thousands of leaders who want the United Way to remain successful in the future?

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Greetings to our United Way NEXT Members!

From Debroah Bayle (Board Chair)

WOW! What a ride we're on! It's such an exciting time to part of this dynamic organization.

We are so proud to launch our rebrand and new name – United Way NEXT. The board has been hard at work on this rebranding journey for almost a year. We have done extensive research, strategic planning, and focus groups to ensure that we are providing meaningful value to all our members and a name that is inclusive and fitting for all of our constituents, whether they are alumni, current employees, retirees, or local United Ways and state organizations. We think we've done it with United Way NEXT. A huge thank you to Barbara Edmond for leading this massive effort, as well as the other members of the Rebranding Work Group.

We're also deep into the search for a new President and CEO. We've received many resumes and are encouraged by the fact that so many talented professionals are attracted by the position and want to be part of leading us into the future. We hope to make a decision in the next couple of months. In the meantime, Keith Barsuhn has stepped in as Interim CEO and is doing an amazing job of keeping the many balls in the air and making sure nothing falls through the cracks. Ed Rivera is chairing the Search Committee and, along with the other members of the committee, will ensure that we hire the best person to take United Way NEXT to the "next" level and beyond.

I'm delighted to welcome two new members to our Board of Directors: Peter Manzo, President and CEO of United Ways of California and Deborah Zuloaga, President and CEO of United Way of El Paso County (TX). Pete and Deb will complete the unexpired terms of Janet Jackson and Adrianna Cuellar Rojas who had to step off early. We are thrilled to have them with us. They are also joined by three new elected members in Paul DeBassio (Bristol, NH), Mary E Tyler (Englewood, OH), and Jim Yu (Great Falls, VA). You can read more about them in this issue.

Our Annual Gathering in Louisville, KY, is a go for September 27 – October 1. We're excited to be able to meet together again to renew acquaintances and make new friends. Please mark your calendar now and plan to join us. Joe and Terry Tolan are our hosts and guarantee us a terrific time.

I hope you'll take a few minutes to go through this newsletter. There are so many ways for you to make connections and make a difference.

Thanks to each of you for your commitment to United Way NEXT. I am grateful to you for your support.

Warm regards,
Deborah

WELCOME NEW MEMBERS!

Nicole Ambrose-Jones • Brandywine, MD
Michael Brooks • Washington, DC
Paula Gilberto • Farmington, CT
Karsten Halusa • Alexandria, VA

Kim Lewis • Billings, MT
Beth Noble • Argyle, TX
Carole Peters • Marengo, IL
Thomas Raiche • Dracut, MA
Mark Sutton • Locust Grove, GA
Charles E. Wright • Batavia, OH
Rosalia Velazquez • Newark, DE

THANK YOU TO OUR CORPORATE SUPPORTERS



Mutual of America has been a generous supporter of UW NEXT since the inception of the organization more than 30 years ago. Their annual contribution is an important part of ensuring program growth and continuity.



We also acknowledge an important financial contribution in 2021 for Proctor & Gamble, which enabled the UW NEXT Board to participate in diversity, equity and inclusion (DEI) training provided by the National conference for Community and Justice (NCCJ).



Interim Leader at the Helm

From Keith Barsuhn, Interim CEO

Hard to believe that four months have passed since taking on this role. I am honored to be working with an outstanding group of Board Members, staff, special skill contractors and volunteers. Most importantly, we are fortunate that United Way Worldwide continues to provide vital services and expertise that help us accomplish so much at a fraction of the cost.

The rebranding has been a remarkable effort driven by Barbara Edmond as chair, and Kelli Kreps, former UWW VP of the US Network, who is providing outstanding support around the Rebrand Rollout process. Also, a big hand goes to Scott Burks and Sarah Storrs at UWW Marketing & Communications who have driven our key changes in graphics and the new UW NEXT Brand logo! I hope you didn't miss the Brand Launch on May 25. Check us out on our newly revamped website at www.unitedwaynext.org.

Program activity pace is beginning to pick up. I have been personally enjoying the online reunions with many great former United Way leaders, plus the new "alumni" reunions that include former United Way professionals in RD, Major Gifts and the Advanced Leadership Program. Perhaps the best outcome came from our last Member Meet Up, hosted by Diane Lebson, about writing and publishing a book. Now we have the beginning of a Writers Club. Come join the chance to contribute your skills and experiences. With so few books ever published about this great movement, there are stories to tell about how we changed society for the better!

Being competent in this role has a lot to do with my recent learnings through the Interim Executives Academy. That's the course made possible by Jeff Wilcox and the 3rd Sector Company. UW NEXT is creating an important partnership with 3rd Sector to help fill a need for interim leadership at local United Ways. I encourage you follow us and consider what you can do to become a part of it.

Thank you for your support for United Way NEXT, and please remain engaged!

Onward,
Keith

Welcome United Way NEXT's New Board Members



MARY E. TYLER

Tell us about yourself (whatever you want to share).

After retiring from United Way, I had the privilege of serving as an adjunct instructor at two community colleges in Gastonia and Charlotte, NC, where I developed a series of nonprofit courses and seminars. I enjoyed meeting individuals with a passion for service who needed additional support and resources to deliver on their mission. After returning home to Dayton, OH, my joy of teaching continued as the executive of NCCJ - The National Conference for Community and Justice of Greater Dayton. I developed content and facilitated learning and conversations on equity, diversity, and inclusion (DEI) in this role. Now, as a consultant and community volunteer, I remain active in our regional DEI initiatives. It's just part of my DNA. It's a delight to be part of the UWRA board. I look forward to learning more about the board and United Way Worldwide and sharing my gifts and talent to support the success of both organizations.

How did you come to know UW NEXT, and how have you been involved so far?

Initially, I was introduced to UWRA following my retirement in 2009 and participated for a few years. Last year, friend and mentor, Bill Mills contacted me to catch up. As part of our conversation, he shared information about UWRA and suggested I reconsider membership. He sold me on joining again.

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

I miss the connections with individuals who were part of my United Way journey and experience. I look forward to reconnecting and meeting new colleagues. The system has changed considerably, and I hope to learn more about the people and work done locally and globally. Finally, and most importantly, I look forward to being part of a movement that helps to reframe the conversation about the value and impact older colleagues add to this critical work.

What would you like to share that UW NEXT members may not already know about you?

I accepted the leadership challenge of helping the City of Dayton become an official Human Rights City. Although the task is a mammoth responsibility, the timing is right as communities across the country wrestle with human rights and dignity. We have some incredible and passionate individuals involved, and we want to ensure that this initiative is community-centered, encompassing diverse voices with well-being metrics.

Describe your history with United Way.

I began my career at United Way of El Paso County as the Campaign Director in early 1994. I took a "sabbatical" from 1999 to 2002 to serve as the Executive Director of our member agency, Girl Scouts. I returned to United Way in the role of Associate Director and in February 2003, I was selected by the board of directors to serve as President and CEO. I am most proud of how our United Way has evolved from a transactional fundraising agency to a transformational community agency. Since 2019, we have been working with partners on addressing the needs of asylum seekers, serving as the lead organization addressing the community-wide healing after an August 2019 mass shooting, and now responding to COVID-19 through a county-wide navigation model.

How did you come to know UW NEXT, and how have you been involved so far?

I have known about UW NEXT since I began working for United Way. I always enjoyed the printed newsletter, especially the "funnies" and the "life tips." Our United Way benefited when a UW NEXT member served as a fundraising consultant and led us through a CAN-DO. Huge benefit!

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

Joining with a group of knowledgeable and inspirational leaders dedicated to increasing the impact of the United Way movement. I know that now, more than ever, local United Ways are critical to addressing ever changing community needs.

What would you like to share that UW NEXT members may not already know about you?

I'm trying very hard to train for my first Sprint Triathlon a.k.a. mini triathlon!



**DEBORAH
ZULOAGA**



PAUL DEBASSIO

Tell us about yourself (whatever you want to share).

I'm a Boston area native with deep New England roots and moved permanently to central New Hampshire 8 years ago. I have a great love of the outdoors and can hike, kayak, snowshoe, ski, and golf either from my front door or "down the road apiece" (as we say in NH). I recently celebrated my 33rd Anniversary with my college sweetheart, Sue. Our son Joe bought a house 2 miles away, so I get to see the grand dog, as well as the ducks and goats quite a bit. If not outdoors or spending time with family; I am volunteering at Whole Village (a UW run Family Resource Center) as a VITA tax preparer, serving Plymouth State University as a member of the Business Advisory Board, serving the Newfound Lake Region Association, and doing trail maintenance for the Appalachian Mountain Club.

Describe your history with United Way.

I spent a total of 20 years in the UW system with 4 different organizations. After starting my UW career at United Ways of New England (UWONE), I crossed the aisle (on the same floor) and became the Chief Development Officer for UW Mass Bay. While at Mass Bay I became more engaged with the network and my peers across the country, especially through UWW's Executive Resource Development Institute. That experience eventually led me to work for UWW, first as the US Vice President for Network Performance and then as EVP, Investor Relations. After 5 years of flying down to Alexandria and points across the globe every Monday at 6:00am, I was ready for early retirement. But, my home UW, Granite UW in Manchester, NH, needed a little development support and what started as a 3-6-month contract role turned into 2 years as Chief Development Officer. I finally retired in September 2020, and then contracted with UWW to "coach" UW of Central New Mexico as part of the Modern UW Initiative. Like so many others, it is hard to completely leave UW.

How did you come to know UW NEXT, and how have you been involved so far?

Working with UWW, I was fortunate enough to see firsthand the work of UW NEXT and became an individual member. As soon as I retired, I heard from Amber and joined a few webinars. Almost every Board member was someone I worked with while at UWW. Many were NPC members, and all were local UW leaders I greatly respected. When Joe Tolan and Mike Durkin asked for help on the Fund Development Committee, I was more than happy to step in. I was also fortunate enough to be a part of the Aging Mastery program, which timed perfectly for an early retiree. Working with Amber, we discussed the opportunities for UW NEXT to also engage with alumni: executive level leaders who have left the network, but are very actively employed and engaged in their communities. This led to successful Zoom "reunions" for Advanced Leadership Program graduates as well as Resource Development VPs.

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

I'm excited to see the launch and rebranding of UW NEXT (in whatever form that takes); and, am most interested in expanding opportunities to engage UW alumni. There are so many incredible UW leaders, actively employed and retired, who can still play a role in strengthening their local communities. I'm looking forward to providing all members with opportunities to connect/reconnect with peers and to continue making a difference beyond their time at UW.

What would you like to share that UW NEXT members may not already know about you?

My deep New England roots are so deep, I can trace two ancestors to the Mayflower.

Tell us about yourself (whatever you want to share).

I'm most proud of the relationships that I've built and grown with United Way colleagues around the world.

Describe your history with United Way.

I've served local United Ways and the United Way Network for 30+ years at United Way Worldwide.

How did you come to know UW NEXT, and how have you been involved so far?

I've volunteered with UW NEXT as a consultant on innovations, relationship management and targeting new markets.

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

Continuing to work with the United Way family to expand our community of United Way retirees and alumni.

What would you like to share that UW NEXT members may not already know about you?

I teach a virtual course called Family Connections™ which provides education, skills training, and support for people who are supporting a sufferer of Borderline Personality Disorder or Emotion Dysregulation.



JIM YU

2022 BOARD OF DIRECTORS

Deborah Bayle, Board Chair
Barbara Edmond, Incoming Board Chair

Robert Ferriday III, Treasurer
Joe Tolan, Secretary
Carol Burger, Vice-Chair
Susan Dunn, Vice-Chair
Rob Reifsnnyder, Vice-Chair

Susan Gilmore, Immediate Past Board Chair
Dick Aft, Emeritus Board Member
Paul DeBassio
Robert Hines
Peter Manzo

Ed Rivera
Mary E. Tyler
Jim Yu
Deborah Zuloaga

THANK YOU, UNITED WAYS

Generous financial support from **local and state United Ways** provides over 40% of United Way NEXT's annual operating budget. Benefits to local United Ways include:

- Coaching, mentoring and consultation on fundraising, leadership, planned giving, board governance, crisis management, and other strategic initiatives
- Retiree and Alumni affinity group tools and capacity building
- Wisdom in the form of skill-sharing and advice, historical perspectives and resources
- Interim staffing solutions, especially at the CEO level

What does this mean for local United Ways? When you (or your team) are seeking mentoring or strategy, or need a leader who can pitch in, United Way NEXT is your go-to resource. Put our talents to good use or call on us when you need some friendly advice, encouragement, or hands-on assistance.

ALABAMA

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

ARIZONA

United Way of Tucson & Southern Arizona

ARKANSAS

Heart of Arkansas

CALIFORNIA

Orange County United Way
United Way Bay Area
United Way of Greater Los Angeles
United Ways of California

COLORADO

Mile High United Way, Inc.

CONNECTICUT

Middlesex United Way, Inc.
United Way of Central and
Northeastern Connecticut

DELAWARE

United Way of Delaware, Inc.

FLORIDA

Heart of Florida United Way
Town of Palm Beach United Way Inc.
United Way of Brevard County
United Way of Broward County
United Way of Florida, Inc.
United Way of Indian River County
United Way of Lake & Sumter Counties, Inc.
United Way of Miami-Dade
United Way of Northwest Florida
United Way of Pasco County
United Way of St. Johns County
United Way of St. Lucie County
United Way of Volusia-Flagler County, Inc.
United Way Emerald Coast
United Way Suncoast

GEORGIA

United Way of Central Georgia, Inc.
United Way of Forsyth County, Inc.
United Way of Greater Atlanta
United Way of Hall County, Inc.
United Way of Northeast Georgia
United Way of the Central Savannah
River Area
United Way of the Coastal Empire, Inc.
United Ways of Georgia Association

HAWAII

Aloha United Way

IDAHO

United Way of Southeastern Idaho

ILLINOIS

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

INDIANA

Crossroads United Way
Indiana United Ways
United Way of Northwest Indiana
United Way of Bartholomew County
United Way of Central Indiana
United Way of Greater Lafayette
United Way of the Wabash Valley, Inc.

IOWA

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

KANSAS

United Way of Greater Kansas City
United Way of the Plains

KENTUCKY

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

LOUISIANA

United Way of Acadiana
United Way of Central Louisiana
United Way of Northeast Louisiana
United Way of Northwest Louisiana
United Way of Southeast Louisiana
United Way of Southwest Louisiana, Inc.
United Way of St. Charles

MAINE

United Way of Eastern Maine
United Way of Kennebec Valley
United Way of Southern Maine

MARYLAND

United Way of Central Maryland

MASSACHUSETTS

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

MICHIGAN

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

MINNESOTA

United Ways of Minnesota

MISSOURI

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

MONTANA

United Way of Missoula County

NEBRASKA

Heartland United Way, Inc.

United Way of Lincoln & Lancaster County

NEW JERSEY

United Ways of Bergen County

United Way of Central Jersey

United Way of Greater Mercer County, Inc.

United Way of Hunterdon County

United Way of Monmouth and Ocean

Countries, Inc.

NEW MEXICO

United Way of Central New Mexico

NEW YORK

United Way of Greater Rochester & the Finger Lakes

United Way of the Mohawk Valley

United Way of Tompkins County

NORTH CAROLINA

United Way of Cumberland County

United Way of Forsyth County

United Way Tar River Region

OHIO

United Way of Central Ohio

United Way of Fairfield County

United Way of Greater Cleveland

United Way of Greater Lima, Inc.

United Way of Greater Stark County

United Way of Greater Toledo

United Way of Licking County

United Way of Summit & Medina

United Way of the Greater Dayton Area

United Way of Warren County Ohio

OKLAHOMA

Tulsa Area United Way

United Way of Central Oklahoma, Inc.

United Way of Norman, Inc.

PENNSYLVANIA

United Way of Berks County

United Way of Lancaster County

United Way of Southwestern Pennsylvania

United Way of the Capital Region

United Way of the Greater Lehigh Valley

United Way of York County

RHODE ISLAND

United Way of Rhode Island

SOUTH CAROLINA

United Way of Anderson County

United Way of Greenville County, Inc.

United Way of the Lowcountry, Inc.

TENNESSEE

United Way of Greater Kingsport, Inc.

United Way of Greater Knoxville

United Way of Metropolitan Nashville

United Way of the Ocoee Region, Inc.

United Ways of Tennessee

TEXAS

Lubbock Area United Way, Inc.

North Texas Area United Way

The United Way of Midland, Inc.

United Way of Amarillo & Canyon

United Way of Denton County, Inc.

United Way of El Paso County

United Way of Greater Baytown Area &

Chambers County

United Way of Greater Houston

United Way of Metropolitan Dallas, Inc.

United Way of San Antonio & Bexar County

United Way of Tarrant County

United Ways of Texas

UTAH

United Way of Central & Southern Utah

United Way of Salt Lake

VIRGINIA

Rappahannock United Way, Inc.

United Way of Greater Richmond

& Petersburg

United Way of Roanoke Valley, Inc.

United Way of South Hampton Roads

United Way of the National Capital Area

WASHINGTON

Spokane County United Way

United Ways of the Pacific Northwest

United Way of King County

United Way of Pierce County

United Way of Thurston County

WISCONSIN

United Way of Dane County, Inc.

United Way of Greater Milwaukee

& Waukesha County

United Way of Portage County

United Way of Racine County

United Way of Washington County

United Way of Wisconsin

CANADA

United Way British Columbia

AND THANK YOU, MEMBERS

Thank you to the **375+ members** of United Way NEXT. Membership in United Way NEXT is open to all who enjoy long-standing and strong ties to the United Way network. Benefits include:

- A place to stay connected with former colleagues
- A way to keep informed and to engage with like-minded others who have shared experiences
- Access to UWW's robust network and repository of resources
- Exclusive programming and services tailored to the community's interests
- Opportunities to serve as a coach or advisor through pro bono work, paid consulting, or interim leadership roles
- Participation in exclusive member events
- The United Way Next newsletter, *UPDATES*

United Way NEXT is especially thankful to the following Leadership Circle Members:

United Way NEXT- NAMED ENDOWMENT FUNDS

Dick & Mary Lu Aft **
Robert (Bob) M. Beggan +
Tom & Carol Brown **
Alan & Selma Cooper **
Dan & Kathleen Dunne +
Jeffrey Wilcox
Maria Chavez-Wilcox

\$2,500+

Lynne Lindo Wassermann +

\$1,000 - \$2,499

Tom & Carol Brown *+
Susan B. Dunn *+
Denise Durel
J. Thomas Laing *+
Ed Rivera *+
Carl Zapora *+

\$500 - \$999

Deborah Bayle *+
Roger Frick *+
John Kurophak
William Mills *
Joe & Terry Tolan *+
Eugene Blyther
Susan Gilmore *+
Ed John *+ & Joyce Wilbur +
Donald Sanders *+
Maria Vizcarrondo
Patrick Hanrahan
Michael McLarney *+
James Taylor
Leo Cornelius +
Janet Jackson *+

\$250 - \$499

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Patricia Smith +
Scott Badesch
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Toni Lanford-Ferguson +
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Brian Hassett +
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Carol Aquino
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Keith Barsuhn
Bob Beggan Family
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Merle Berke-Schlessel
Gil Betz
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Kerry Blume
Phillip Bond
Lynne Bosley
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Erich Briggs
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Claudia Brooks
Jack Brooks
Michael Brooks
Eleanor Brown
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Robert Brown
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Maurine Dyer Stevens
Cynthia Eberhart
Susan C. Eckert
John G. Emge
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Ellen Evans +
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Scott Ferguson
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Deborah Foster +
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Richard Grigos +
Phil Grzewinski
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Robert Haight
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Bette Hoffman
John (Jack) Holmes
Leslie Ann Howard
Mike Hughes *+
Bernie Hyman *+
Rudolph Jackson
Traci Jadlos
Jane Janow
Gary Johnson

Larry Johnson
Ty Joubert
Irv Katz
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Kenneth Kemerling
David Kennedy
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Bill Kitson
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Kelli Kreps
Robert Kulinski
Ben Landers
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David Maurer
Tish McCutchen
Joseph McKinley
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Mark Sutton
Michael Thompson +
Gordan Thibedeau
Mary E. Tyler
Dirk Van Den Bosch
James van der Klok +
Marcia Walker
Merl Waschler
Carole M. Watson *
Steve Webster
Alison Wiley
Roger Wood
Robert Woods
Alex Young
Cathy Yowell

* Current / Former Board Member

+ Endowment Founder/Contributor

Please notify christina.lawrence@www.unitedway.org if you notice information that needs to be updated.



UW NEXT MEMBER SPOTLIGHT

My Involvement as a Volunteer with United Way of Greater Lima After Serving There for 46 Years

By Beverly J. Prueter

It was a quiet day for us in Sun City, AZ last March when I received the email from the United Way of Greater Lima office that they wanted to talk to me about a special project they had that would interest me. I was intrigued. A year of working hard to stay safe was wearing thin. This United Way was where I spent most of my adult life, working there for 46 years, 35 as CEO. Retiring in 2010, we had moved to Sun City, then California, and back to Sun City with my husband's work. So, we were late-in-life vagabonds, to be sure.

Meeting over Microsoft Teams with CEO Derek Stemen and Labor Liaison Erin Hardesty, they proposed that I give thought to serving as their volunteer Virtual Campaign Chair for 2021. My primary responsibility would be for individual giving, including growth of the Alexis de Tocqueville Society. How could I say no? I thought about it for a couple of hours, asked some questions about the structure of the campaign and the status of the Tocqueville Society, which had been started back in 1981, I believe, with one contributor.

We agreed that most of my work would be done remotely, and a local Co-Chair would be recruited for consistency. That person was the local Chamber executive, Jed Metzger, who I had worked with first as ED of the Lima Chapter of the American Red Cross. I would meet virtually with the campaign team and record a message for the general kickoff. The theme of the campaign was "Team United-All In" which for us meant that we would work to get involvement in many ways from as many people as possible, whether it be as advocates, volunteers, or contributors. We had lost ground meeting face-to-face with people and no events had been held, so the Kickoff would be a first local event for the drive. I don't travel well, but my husband said I would not be happy if I didn't go back for something, so we decided we would go in for four days where I would spend the time in meetings with agency directors, local leaders, appear on the local Noonday television show and attend the Alexis de

Tocqueville Society reception before I left. They set up a schedule for me, and we were ready to go.

The general kickoff was held outside at The Ohio State University Lima campus, where my recorded message was used. The attendees went on to complete special projects at agencies as Lima's Day of Caring.

I spent considerable time at home considering methods to recruit new Tocqueville members. Lima currently had 10 members, many of whom had been members when I retired. That meant there was stability and commitment among the group, which had raised some \$160,000 in the last campaign. My objective was to grow new membership. I recruited two Co-Chairs and they each selected contacts they would like to make, as did I. I started with a recruitment letter to current members, letting them know what we were planning, and asking them to make their pledge and save the date for the October reception. Then we moved to recover lapsed donors, and then to prospects. All received a save-the-date card for the event and prospects were personally contacted over the summer and into fall. I so enjoyed talking to people I had worked with for so long. I also visited two partner agencies, Crime Victim Services and Lima Senior Citizen Services, finding their programming to be going strong with new programs added to meet the needs of our community. I met with the mayor of Lima who was about to retire, and visited friends, ending with the Tocqueville event, which was a reception with light food and time to talk about the Society and its history. In the end, we recruited 7 new members and raised \$233,000 for the campaign. I plan to do this in some fashion again in the 2022 campaign.

Take-aways if you decide to try this:

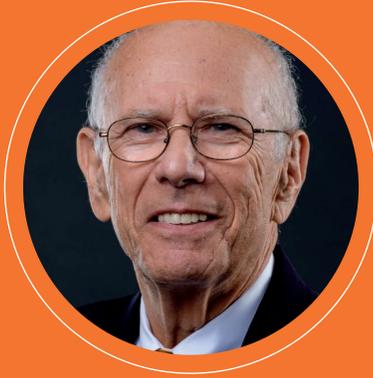
- It's possible, as much business is being done remotely at this time.
- The personal touch is always best, particularly when you are asking for a gift – but face-to-face, Zoom, telephone – they all

work. I loved my call to Bill Timmermeister, whom I had not talked to in 12 years. He immediately knew my voice and said yes to co-chairing the Tocqueville campaign with Betsy Webb Winget, both of whom came from families who had been staunch supporters of the community and the United Way for many years.

- You can go home again. But things are different. Respect that and move forward. We had lost several members due to death and seeing that their children were now so involved was very gratifying.

I made many phone calls and sent a lot of letters. In December, I sent all members a personal letter thanking them for their gift, and if it warranted, expressing regret if I had not been able to see them personally while in Lima. I will miss not being on site for a longer period.

If you wish to talk to me about this, I can be reached at ohiosnowlover64@gmail.com.



HISTORICAL PERSPECTIVES

What's Next? Exciting Paths Follow United Way Service

By Dick Aft, United Way Historian & United Way NEXT Emeritus Board Member

"We all need to consider what we will do when we no longer work for United Way." That was the 1977 advice that retiring Mobile, Alabama United Way exec **Bill Kaufman** gave to 10 Key Cities affinity group members. He went on to encourage them to consider community foundation service following their retirements. Among those who heeded Kaufman's advice was United Way NEXT co-founder **Gordon Berg**. In 1978, he retired from the Charlotte United Way to become the first staff director of the Community Foundation of the Carolinas.

Recent U.S. census data suggests that people will have twelve different jobs during their careers. Most readers of UPDATES know family members who only worked for one employer during their lives. During her HR career at United Way of Greater Cincinnati, **Mozella Westmoreland** said, "career loyalty to United Way is infectious. Once employees have been with us for three years, they're with us for life."

Between career changes and early retirements, fewer United Way employees spend their entire working careers in the United Way movement. What do they do? A recent United Way NEXT-sponsored "History Hangout" webinar featured a couple discussing "Is There Life After United Way?" 15-year President & CEO of the Orange County, CA, United Way **Maria Chavez Wilcox** discussed her career transition to CEO of the country's largest YWCA in Seattle. **Jeffrey Wilcox** is a United Way veteran with nearly two decades of United Way Community Development and Communications leadership experience, most recently in Los Angeles. He told of his 2002 work to create and now lead the 3rd Sector Company, a specialist in non-profit organization management. **Bill McQueen** followed his work with United Way of America and several United Way organizations by earning a Ph.D. and opening childcare centers in underserved Atlanta neighborhoods.

Variety best describes professional life after United Way. Following his ownership of a restaurant, **Carl**

Zapora served in United Way leadership positions in five different local United Ways. He then became United Way of America's Mid-America Director, next CEO of Verdant Health, a 200-bed hospital. Today, he heads his own consulting firm. After a decade with United Way in Cincinnati, **Don Turner** manages university testing centers on the East Coast. After retiring from United Way in Charleston, SC, **Elizabeth "Ducky" Gower** served two terms as a member of the Greenville City Council.

Baton Rouge, LA, volunteers presented their director **Myron Falk** a rocking chair at his United Way retirement celebration. He then created and led the Baton Rouge Community Fund for the Arts and was often heard asking if anyone could teach him how to find time to rock. After 17 years as president of the Indiana Association of United Ways, **Roger Frick** has co-facilitated Implicit Bias workshops for over 2,000 people, including teachers, administrators, doctors, university professors, church leaders, and zookeepers.

When **Bill Mills** isn't writing poetry, he shares his career planning expertise as a volunteer. **Solon Cousins** left the YMCA field to head Chicago's United Way, then returned to the YMCA as president of national YMCA of the USA, a position currently held by **Suzanne McCormick**, immediate past U.S. President of United Way Worldwide. Previously, McCormick had spent 20 years as a local United Way CEO. From presidency at United Way of Miami and Dade County, FL, to the presidency of the national MedicAlert Foundation, **Tanya Glazebrook** applied the leadership and marketing skills she learned in a variety of United Way positions.

Julie Mercer followed five years at United Way of Central MD as Senior VP of Marketing, then marketing and development officer for American Red Cross. She is now VP Philanthropy & Development of the Bon Secours Baltimore Health System. After 20 years in United Way, including several as VP, Community Impact at United Way of America, **Irv Katz** enjoyed what he called a post-

retirement "encore" career as CEO of the National Human Services Assembly and its subsidiary PurchasingPoint. Former Senior VP at United Way of America **Dennis Murphy** is also known as **djv murphy**, the award-winning author of twenty books and screenplays. **Eleanor Brilliant** worked with Murphy at United Way in Westchester, NY, and then spent 20 years as a Rutgers University School of Social Work professor. She authored three books, including her 1990 publication, *The United Way: Dilemmas of Organized Charity*.

So many examples of career paths! Plus, almost all former United Way employees report continued non-profit involvement as volunteer board members, consultants and hand-on workers. As employed professional or engaged volunteers, they clearly illustrate that there is "life after United Way."

EDITOR'S NOTE

*Dick Aft, our United Way historian, and three of his family members also illustrate the richness United Way NEXT. After 40 years of United Way professional leadership, Dick earned a Ph.D. and applied it to roles ranging from historian to educator. Following in his footsteps, two his sons **David Aft** and **Eric Aft**, along with his daughter-in-law **Lisa Aft**, have followed over sixty years as United Way professionals with next careers that include heading non-profit organizations, teaching and entrepreneurship.*

UPCOMING EVENTS

The following events are open to current UW Next members. Visit www.unitedwaynext.org to register and receive access information.

UW NEXT Annual Gathering

Join us in September for the 2022 "Gathering". We'll explore the city, sample delicious food, and take advantage of the discounted group rates on the many excursions available. **Event Registration** (\$125) is now open.

Hotel Reservations: Guest rooms are at the Galt House Hotel with a special rate for UW NEXT members. Our Hospitality Suite will be the gathering point for networking with friends over drinks, making dinner plans, and previewing the following day's activities. Reservations can be made by clicking on the Hotel Reservation button on our web site or you can call 800-843-4258 and reference group code **092522WAY**.

TUESDAY, SEPT. 27TH

Meet and greet participants during our Welcome Happy Hour.

WEDNESDAY & THURSDAY SEPT. 28TH & 29TH

Your choice to engage in the exciting activity listed below. Specific dates, times and admission details will be announced soon.

Private Trolley Tour

Your introduction to Louisville, a 90-minute, fully narrated trolley tour by a knowledgeable and friendly Louisville native.

Louisville Slugger Museum and Factory Tour

Batter up! Experience history in the making as you stroll through the actual factory where world-famous Louisville Slugger bats are created.

Muhammad Ali Center Tour

Three levels of award-winning exhibits and galleries exploring Muhammad Ali's legendary life, as well as to reflect upon one's own individual values, inner strength, character, and what makes you the greatest person you can be.

The Roots 101 African-American Museum

Tells the story of the African-American journey from Africa and all ports in between and to inspire appreciation of the achievement, contribution, and experiences of African Americans by illustrating



African-American history, culture and art.

Frazier Museum

An affiliate of the Smithsonian, the Frazier documents and reinterprets stories from history using artifacts, exhibitions, and live daily interpretations written and performed by a talented staff of teaching artists.

The Speed Art Museum

Kentucky's oldest and largest art museum. Experience the power of creativity through major exhibitions and an encyclopedic permanent collection that spans 6,000 years of human history.

Bourbon Distillery Tour

See how Kentucky's signature beverage is distilled, barreled and bottled, and taste some of the finest bourbon Kentucky has to offer.

FRIDAY, SEPT. 30TH

Churchill Down & The Kentucky Derby Museum

See how Kentucky's signature beverage is distilled, barreled and bottled, and taste some of the finest bourbon Kentucky has to offer.

SATURDAY, OCT. 1ST

Depart for home.

Interim Executive Academy

JUNE 2 – JULY 21

Third Sector Company's next Interim Executives Academy includes 16 hours of immersion training on interim leadership, over an 8-week period. Academy participants will discover the strategic nature of transitional leadership and learn how to negotiate the interim engagement. UW NEXT members can participate at a discounted rate. Email keith.barsuhn@uww.unitedway.org for more information.

UW NEXT Overview for New(er) Members

JUNE 6 @ 12PM ET

(Re)connect with fellow UW NEXT members, discover the benefits of your membership, and learn about the important work UWRA is leading. Content is aimed at new(er) members, but this overview is open to all members.

Major Gifts/ Planned Giving Reunion

JUNE 7 @ 4PM ET

Hosted by Carla Crossno and D.J. Hampton for all former United Way Major Gift and Planned Giving Directors.

Select Cities Reunion

JUNE 14 @ 4PM ET

Hosted by Rob Reifsynder for all former United Way CEOs who participated in the Select Cities Roundtable.

Planned Giving Office Hours

JULY 28 & AUGUST 15 @ 4PM ET

Hosted by Dan Dunne for all current United Way Planned Giving staff designed to learn from experienced former United Way executives.

Member Meetups

SEPTEMBER 7, OCTOBER 5, NOVEMBER 2 @ 4PM ET

Part educational and part social, these online discussions (re)connect UW NEXT 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.

History Hangouts

JULY 20, SEPTEMBER 21, NOVEMBER 16 @ 3PM ET

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. Themed calls are held on the third Wednesday of each month by Dick Aft, United Way Historian and UW NEXT Emeritus Board Member.

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