



# What's NEX



## WELCOME LETTER FROM PRESIDENT AND CEO, CAROLE PETERS



Growing up in northern Illinois, in the rural farming community of Marengo, provided me the opportunity to see how important it is for people to come together offering a helping hand. We never drove by anyone on the roadside without waving hello. We were encouraged to be kind, shake hands with our neighbors when greeting one another and offer to help when there was work to be done.

I remember spending countless hours in the summer working alongside my dad who volunteered my siblings and me to help a local farmer pick rocks in a corn field to ensure his equipment would not be damaged while plowing the field in the fall. I also remember baling hay each summer and helping unload countless wagons each evening so that the farmer would get the hay under the roof before it would rain. At the time, I had no idea the profound impact these experiences would have on my life.

You wonder why I share this specific story? Well, as your President and CEO of United Way NEXT, I feel called to serve. Just as I

served my community by lending neighbors a helping hand to eventually serving as CEO of United Way of Greater McHenry County, I am committed to leading and serving United Way NEXT. Like many of you, I have rolled up my sleeves to work hard for my community by increasing community engagement and contributions to ensure people benefited from local services. Together we have witnessed the power of people coming together to help one another and uplift our communities. These efforts created a ripple effect that sometimes went unnoticed in the moment but left a lasting impact and imprint on the hearts of the people who benefited.

As my first month unfolds, it is already clear to me that we are a Community of United Way Leaders. We are a diverse group of individuals who represent retirees who have stopped working, alumni who have left United Way and are still working, and current United Way staff. When I look around at the wisdom that this community offers, I am so impressed. I see so many new and experienced leaders who have a passion for giving back, sharing insight, uplifting others, and making themselves available to support our United Way friends whether working or not.

**We are a community. When we gather—whether for fun, conversation, workshops, seminars, or service—we feel that profound sense of purpose and belonging that drew us to United Way in the first place. 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. We are a supportive circle where everyone's perspective is recognized and valued. We stay united to help each other and our communities succeed, now and in the future.



If you are NEW to United Way NEXT, I invite you to join us for an upcoming event. (See page #5.) Find a way to connect within this rich community of people who are engaging, inspiring, and thriving. Whether you are considering retirement, recently retired, working full time, part time, recently displaced due to a job change, or just not sure What's NEXT, we are here for you. As your new leader, my door is always open, and I want to ensure we create an inclusive community where everyone feels welcome. Looking forward to What's NEXT; I invite you to join us to continue the connection.

**Carole.Peters@UWW.UnitedWay.org**

## LETTER FROM BOARD CHAIR, DEBORAH BAYLE



By now you've heard that we hired a new President and CEO, Carole Peters. I couldn't be more excited about Carole! She brings a tremendous amount of knowledge and experience to United Way NEXT, as well as an abundance of energy and enthusiasm. Carole started her new position on August 8 and she hit the ground running! She has already generated new ideas and made many new connections. I know she's going to be a great leader for our organization. Please make sure you get to know her. She is anxious to meet all of our members and to hear what's on your mind.

Our former CEO, Amber Kelleher, left us at the end of last year. We were extremely fortunate to

find an Interim CEO to help us through the past few months. Keith Barsuhn joined us in January and has done an outstanding job of keeping the many balls in the air and making sure that he didn't drop any. We owe him a huge debt of gratitude for the wonderful work he has done. A Search Committee was formed in January to find and hire just the right person to lead our organization. This amazing group of people was led by Ed Rivera, and included Susan Gilmore, Barbara Edmond, Mary Tyler, Jeffrey Wilcox and me. This incredible team worked countless hours for seven months to ensure that we were getting a top-notch group of candidates, that we were asking the right questions, and that we were thoroughly vetting our finalists. I'm thrilled to let you know that the Search Committee was successful, and we DID find the right person for the job, and that person is Carole Peters.

And now, the real work begins! We are so excited about the many opportunities we have right now as we determine what's NEXT.

**We have a new brand and a new name, as well as a new leader, and we are committed to you, our members, to serve each of you and to provide value to you.**

Our members come from several different segments: local United Ways and State Organizations, retired United Way professionals, United Way alumni, and current United Way employees. We pledge to you that we will provide services and programming that meet your needs. We understand that each of our member segments is unique, and we must tailor our programs and services to each segment.

It's a terrific time to be part of United Way NEXT! Our future is bright and full of promise. We are excited about the many possibilities we have to serve the United Way Network and our members. Thank you for being a member. I'm grateful for your continuing support. By working together, we can create the very best what's NEXT.

I invite you to reach out to Carole, to me, or to any of our other board members, with your thoughts and your ideas. We value your insights and your opinions. I really do want to hear from you.

[DSBayle@Gmail.com](mailto:DSBayle@Gmail.com)

## NEW MEMBER SECTION

**John Glenn** O'Fallon, MO

**Peter Poulos** Trenton, MI

**Carla Crossno** Coral Gables, FL

**Rich Voccio** Seekonk, MA

**Gary Vipond** Goulais River, Ontario, CAN

**Sharon Sparrow** Naples, FL

**Jeffrey Hayward** Chuluota, FL

**Kelly Fischbein** Falls Church, VA

**Keith Heinly** Palm Bay, FL

**Deborah Zuloaga** El Paso, TX

**David Johnson** Auburn, NH



## MUTUAL OF AMERICA SPONSORSHIP ARTICLE - JOE TOLAN



### Take a Fresh Look at Mutual of America

Two years ago, on the 75th anniversary of Mutual of

America, Dick Aft, United Way Historian and United Way NEXT emeritus board member wrote, "from the beginning, Mutual of America shared United Way's commitment to meet human needs. That is because today's Mutual of America grew from a seed planted in 1943 by United Way staff and volunteers. The company began in 1945 with a grant and loans from Community Chests and Councils of America totaling \$35,000."

At that time, the Social Security Act did not include employees of private charitable, educational, or religious agencies and institutions,

as many of those organizations opposed such coverage because they felt they could not afford their share of the cost. Over time these organizations realized that they could not afford to not offer such coverage, and in 1950 the Social Security Act was amended to include such employees.

Mutual of America Financial Group has grown significantly over the years and had more than \$29 billion in assets at the end of 2021 and over 18,000 clients across the nation. It serves more than 500,000 individuals – quite a change from its earliest days when it served a few thousand health and welfare employees.

Many local United Ways work with Mutual of America. In the last year, Mutual has provided enhanced products and services that are tailored for the non profit sector, including local United Ways. Representatives at Mutual work closely with United Ways to further enhance their retirement plans by offering

flexible plan designs, including 403(b)s, and a diverse choice of investment funds, while also providing valuable education to help United Way employees achieve retirement readiness.

At United Way, we share a long and productive history with Mutual of America, and I encourage current local United Way leaders to reach out to Mutual of America to gain a refreshed understanding of the ways in which they can serve your needs.

To contact a local Mutual of America representative about your account, or to learn more about Mutual of America's products, services and investments, please visit [MutualOfAmerica.com](http://MutualOfAmerica.com).



### National United Way Interim Executives Roundtable

*An alliance between United Way NEXT and Interim Executives Academy*

United Way NEXT is actively building a pipeline of current and former United Way

Executives who can serve as professionally trained interim executive leaders within the national United Way system. These interims regularly engage in peer advisory and best practices discussions in the National United Way Interim Executives Roundtable, which is sponsored by the Interim Executives Academy for the purpose of providing strategic transitional leadership support to United Way organizations that is purposeful, methodical, and transformational.

Third Sector Company has become a nationally recognized pioneer and leader in the training and support for strategic short-term leadership to nonprofit organizations. Every United Way interim candidate receives comprehensive interim leadership training through Third Sector Company's Interim Executives Academy, an 8-week program that teaches seasoned nonprofit executives to follow a methodology that includes 6 phases, 13 protocols, and 6 interventions of

professional interim leadership. The spring class included four additional United Way NEXT member graduates, bringing the total number of graduates to 18. They include:

- |                          |                             |
|--------------------------|-----------------------------|
| <b>Keith Barsuhn</b>     | <b>Beth Noble</b>           |
| <b>Toni Carlo</b>        | <b>Maureen Noe</b>          |
| <b>Carla Crossno</b>     | <b>Sarah Smith Orr</b>      |
| <b>Susan Dunn</b>        | <b>Mary E. Tyler</b>        |
| <b>Winston Faircloth</b> | <b>Maurine Dyer Stevens</b> |
| <b>Susan Gilmore</b>     | <b>Rosalia Velazquez</b>    |
| <b>Pamela Haas</b>       | <b>Anne Wilson</b>          |
| <b>Karen Macier</b>      | <b>Doug Yeiser</b>          |
| <b>David Nicole</b>      | <b>Jeffrey Wilcox</b>       |

The fall class begins on October 4th. If YOU are interested in joining the next Interim Executive Academy class, please contact Joan Baumgartner-Brown, Interim Executive Academy Senior Strategist, at [ThirdSectorCompany.com](http://ThirdSectorCompany.com) to register. United Way NEXT members receive 30% tuition discount!

## NEW BOARD MEMBER, PETE MANZO



### Tell us about yourself

I'm a Mexican-Irish, lapsed Catholic kid born in southern California, a proud husband and father of two (ages 21 and 18). I'm a recovering attorney, I practiced real estate and corporate law for private law firms in LA, then moved into public interest law at Public Counsel, representing nonprofits involved in community development, affordable housing, social services, health, the arts and more, then ran a nonprofit management, training and consulting org (Center for Nonprofit Management in LA), and worked on data-driven and organizing approaches to civil rights at The Advancement Project before joining United Ways of California.

### Describe your history with United Way.

In my prior work in public interest and civil rights law, I worked with Joe Haggerty and Elise Buik on boards and committees, and I was on a couple of grant review panels for United Way of Greater LA in the late '90s and early 2000s, but what really drew me to United Way was seeing how UW Greater LA moved to become an anti-poverty organization in the mid-2000s, and made the hard decisions required to make that shift. A couple years later, I did a training session for the UW Greater LA board about the rules regarding lobbying and advocacy for nonprofits and strongly encouraged them to do more policy advocacy, something that United Ways can do directly and at greater scale than foundations because we're public charities. When I heard that California United Ways were thinking about creating a state organization to support their public policy advocacy, I applied and was hired. Our California United Ways are very collaborative, so we've grown a good deal (from 2 employees in 2009 to 23 today) and done some great things, such as helping create and implement a state earned income tax credit now providing over \$1 billion a year to working families earning below \$30,000. The people who lead our California United Ways, and UWs across the country, are some of the best people I've ever worked with, and I'm still learning new things all the time. I still feel new to UW.

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

Previously, I hadn't had that much interaction with UW NEXT. I knew that the UW Retirees Association was a good source of knowledge and learning, for interim CEOs or people who knew well how to manage United Ways. When the prior Council of States Representative to UWRA left United Way, she suggested me to replace her, and when Keith Barsuhn, who I've enjoyed working with under several of the hats he's worn/wears, told me more about UW NEXT, I was honored and delighted to join the board.

### What are you looking forward to most about serving on the United Way NEXT Board?

When I found out about the new name and focus, I was very excited about the opportunity for us to connect with United Way alumni, people who have worked with us in some way in the past. From the state org perspective, I often see people moving on to other endeavors that we'd want to keep in the United Way fold somehow. (And in our public policy advocacy work, we often discover past relationships we should track, I've run into several elected officials, from US Senators to state Assembly members who have said "oh, I used to chair a campaign for United Way of X" or "I used to work at United Way of Y"). The new focus for UW NEXT gives us an opportunity to widen the circle, to reconnect with people who may be great champions and supporters, whether they are retired or currently working.



## UNITED WAY NEXT UPCOMING EVENTS

### Interim Executive Academy

**Tuesdays, 10/4, 10/11, 10/18, 10/25, 11/1, 11/8, 11/15, 11/22 1-3pm ET**

The Interim Executives Academy provides rigorous training and mentoring for interim leaders serving nonprofit organizations in short-term, senior-level engagements. Interim work is a thoughtful and productive “next step” for career professionals desiring to transition out of permanent full-time positions but remain engaged in the satisfying work of community service. This program, co-founded by Jeffrey Wilcox, former UW executive in LA and Seattle, provides eight weeks of online sessions for a total of 16 hours of learning that explores Third Sector Company’s strategic approach to transformational interim leadership. The IEA brings together professionals from diverse community impact organizations to learn together and prepare to fill crucial interim positions throughout the nonprofit sector and within the UWW system. How about you? Tuition discounts of up to 30% are available for UW NEXT members!

### Planned Giving Office Hours

**Thursday, 10/27 4-5pm ET**

Drop in with questions for our planned giving experts. No presentations, just experienced UW leaders and planned giving pros on hand to provide excellent advice. Dan Dunne will be the host. As the former CEO of United Way Central Alabama, Dan leads one of the most successful planned giving programs in the network.

### Interim Executive Academy Roundtable

**Thursday, 11/3, 10:30am-12pm ET**

The National Roundtable includes United Way NEXT members and other colleagues who have completed the Interim Executive Academy through Third Sector Company.



### Member Meet Up: Coffee with Carole Wednesday, 11/9, 11am ET

Our CEO Carole Peters will facilitate a conversation with a panel of guest speakers to learn how United Way NEXT has provided opportunities for our members to connect, contribute, learn, and grow through our Community of UW Leaders.

### History Hangout Wednesday, 11/16 3-4:15pm ET

Hosted by United Way’s historian Dick Aft, connect with United Way colleagues while learning about how United Way’s rich history impacts the events of today!

### CEO Circles Dates Stay Tuned for Upcoming Session Dates

Susan Dunn and Mike Durkin lead a cohort of local United Way CEOs in a multi-session program. Attendees discuss challenges they face leading United Ways and receive support from other network colleagues.

### Please join us at any of our upcoming events!

To learn more, check out our “Events” tab at [UnitedWayNEXT.org](http://UnitedWayNEXT.org) or email Katelyn Guest, Program Marketing Associate, at [katelyn.guest@uww.unitedway.org](mailto:katelyn.guest@uww.unitedway.org).

## HISTORICAL ARTICLE FROM DICK AFT

### Historical Perspectives

Association, System or Network?  
Regardless, United Way is a MOVEMENT

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

**While attending one of my first national United Way meetings in 1965, I was introduced to Lyman Ford, Executive Director of United Community Funds & Councils of America. He put his arm around my shoulders and said, "Welcome to the movement."**

United Way founders, the leaders of early 20th century Federations of Social Agencies, called it "the movement." So did their successors, at least until the 1970s. It was then that its American national leaders re-energized "the movement" with a common name and logo. [It had been decades since the name Community Chest and the symbolic Red Feather had been universally used by autonomous local affiliates of Community Chests & Councils of America, predecessor of "UCFCA."] In 1972, the rainbow/helping hand logo became the common identifier of the local, state and national affiliates of what is today's United Way Worldwide network.

Definitions of the "movement" can be traced from the earliest years in which federations of social agencies met to share their local experiences in coordinating service planning and funding.

- In his 1927 book, *The Cooperative Movement in Social Work*, United Way's first paid professional Community Chest executive, William J. Norton, defines national discussions among his colleagues as "interactions among individuals whose shared values for the alleviation of human suffering that has brought them together in common cause."
- During the 1960's, business-trained C. Virgil Martin, MBA, whose position as Executive Director of the United Way of Central Indiana, became a stepping stone to his presidency of Chicago-based retail giant Carson Pirie Scott & Co., called United Way "a movement that applies business practices to the achievement of social welfare objectives."



- Social work-trained Gordon Berg, MSW, co-founder of United Way NEXT, retired CEO of United Way of Central Carolinas and the Foundation for the Carolinas, referred to United Way as "a movement based on community organization social work."

Members of today's United Way network share many of the elements that drive organizations such as mission, business practices and vocabulary. But the things they don't share, however, differentiate them from being chapters or branches of a single national or worldwide organization. Each member organization answers to an autonomous local board of directors that employs staff members of their own choosing. While they share experiences, best practices and data, they approach local planning, fund-raising, priority-setting and investment of resources independently.

During the first half of the twentieth century, members of the Community Chests & Councils chose to work in association when doing so fulfilled local needs. "The Three Cs" 1965 reorganization to become United Community Funds & Councils and the 1970 changes that led to the adoption of the name United Way of America, made it possible for affiliates to pick and choose a national menu of programs and services. Today, members of the United Way system continue to define their goals and

practices locally, but must agree to conform to graphic and practice standards when using the United Way name and logo.

Throughout its history, the United Way movement has responded to its stakeholders and the environment in which it has served. It has sought to meet the needs of individuals, families, neighborhoods, cities, states and nations. It has changed as needs have changed and has adapted to prevailing business practices. The United Way movement began when contributions were recorded in hand-written pen and ink ledgers. Today, it wrestles with the challenges of technology in an increasingly global business environment. Whether continued productivity depends on the uniformity of systems or the individuality of networks, remains to be seen. Regardless, the movement is likely to thrive so long as it continues to fulfill to its mission, most recently stated, "To improve lives by mobilizing the caring power of communities around the world to advance the common good." And when the local organizations and people from which it derives its direction and energy work in harmony, like a movement, it will move.



### “A story from a former Campaign Director, at Fundacja United Way Poland”

It seems like such a short time ago that I was working as the first campaign director of the new United Way of Poland. Today, I work as “Teaching English in Poland” Program Director in The Kosciuszko Foundation Inc. (KF), Warsaw Office. My work and personal life are affected in so many ways by the terrible war that goes on just one day’s drive from where I live. Because my grandfather was Ukrainian, I feel emotionally attached to all Ukrainians who are facing the worst time in their lives. I helped refugees by warm welcome to my country, accommodation, food and assistance. I was not the only one – many Poles are doing a great job by supporting Ukrainians every day!

The Russian invasion of Ukraine caught The KF’s team in the admissions process of the “Exchange to the US” scholarship program. Several dozen Polish scientists submitted their projects in cooperation with American universities. For many it’s a chance to fulfill their desire of developing an academic career. Simultaneously, millions of people in Ukraine were stripped away from their dreams and forced to flee immediately from their engulfed, in-war homeland. From the very first day KF has been organizing aid for war victims inside both countries – Ukraine and in Poland.

“Freedom starts with your mind” grant program has been launched for Ukrainian scholars who are in Poland and are unable

to continue their work in their homeland. May we prevent hopes and dreams from dying! My team believes that that freedom is in every single individual, and the power of each human’s mind is capable of vanquishing any adversity and rescuing hope. To date 30 grants 10000 PLN (\$2070 USD) each have been paid to Ukrainian scholars in need.

Recently ago, we celebrated the online closing ceremony of our first round of “Flying University Courses for Ukrainian Students” project. 318 young Ukrainian students from 38 universities applied and 144 have been admitted. Online courses in English have been conducted pro bono by 12 distinguished professors from American universities.

I am responsible for the Teaching English in a program at 6 summer camps for 430 kids. We hosted 2 camps for 80 Ukrainian kids. The classes and workshops are led by 50 American volunteers, Polish and Ukrainian staff. Children are enjoying a vacation near a lake, growing stronger, integrating with their



Polish peers, while improving their language skills. You should see them happy, fearless! We stand with Ukraine!

**Emilia Gromadowska,**  
TEIP Program Director  
The Kosciuszko Foundation, Inc.  
EGromadowska@TheKF.org



## » A MESSAGE FROM UWW LIAISON, LADAWN NAEGLE



Greetings from United Way Worldwide to our United Way NEXT colleagues!

My name is LaDawn Naegle and I will serve as the liaison between United Way Worldwide and United Way NEXT.

I joined United Way Worldwide shortly after Angela Williams joined as President and CEO in October of 2021. My current role is Chief of Staff and Special Counsel to the President and CEO. I have had the pleasure of knowing

and working with Angela for many years. We met when she joined the law firm where I was a corporate securities lawyer, and she was a corporate defense lawyer. After she left the firm for an in-house role and then moved into the nonprofit sector, we remained friends and colleagues, collaborating on a wide variety of projects over the years.

I spent my entire legal career in private practice with a global law firm, where I built a corporate and business practice, working with companies, executives, and boards of directors in a wide array of corporate and compliance matters. The last ten years with the firm I also served in leadership roles, including as managing partner of the Washington office.

I retired from private practice in 2020, ready to engage in mission-focused work in the nonprofit sector. I was volunteering with several nonprofits in the Washington D.C. area in the fall of 2021 when I received a call from Angela. She shared with me that she was joining United Way Worldwide as its new President and CEO, that there was a lot of work to be done, and that

she could use some help. I was only generally familiar with United Way, but I knew if this was a calling that had attracted Angela's commitment, it was no doubt something very important and meaningful. Knowing Angela's leadership abilities and her dedication to serving others, it was an offer I was excited to accept.

My learning curve has been steep, but my instincts about the importance of the work were spot on. The needs of our local communities – not just here in the United States, but around the world – are great, and United Way is uniquely positioned to address those needs. Angela was right. There is much work to be done and I am excited to be a part of the team that is addressing this work.

There are many opportunities for the members of United Way NEXT to connect with the mission and vision of the new era of service at United Way Worldwide. I look forward to working with you to identify and execute on those opportunities.



Our annual gathering in Louisville, KY was a huge success thanks to our hosts Joe and Terry Tolan. On behalf of the United Way NEXT Board of Directors and gathering guests, we extend a huge THANK YOU for the wonderful hospitality, enlightening excursions, and amazing time in Louisville. Until NEXT time!!