



What's NEXT



OH, THE PLACES WE'LL GO-CELEBRATING THE UNITED WAY NETWORK AT GREAT RIVERS IN ROCHESTER, MN

Author: Carole Peters, UW NEXT CEO

As UW NEXT CEO, I am always going to cherish my time spent in the field serving and celebrating with our local United Way leaders across the country. In mid-March, I had the wonderful opportunity to travel to Rochester, MN to connect and engage face to face with so many amazing people who serve at local United Ways. This year's conference was hosted by United Way of Wisconsin and United Way of Olmsted County with the theme "Oh, the Places We'll Go". These local United Ways did an excellent job of planning the conference, offering rich content, inspiring guest speakers and finding ways for all of us to connect. From the learning breakout sessions to the United Way Worldwide presentations featuring guest speakers Angela Williams, UWW Chief Executive Officer, and Alice Archabal, UWW Chief Development Officer, I was listening and learning all week long. My ear to the ground was intentional as I looked for ways for UW NEXT to connect with our members in the field in meaningful ways and help expand awareness of all that is offered through this community of United Way leaders.

UW NEXT hosted two learning sessions, one led by a panel of guest speakers that I was able to facilitate. During this session, we unveiled to the network valuable resources that are made available through our partnership with United Way Worldwide. UWW Director of Major Gifts, Jennifer Gipp, shared the valuable resources available to get started with endowment, planned giving, anniversary campaigns and so much more. UW NEXT shared more about the 20 volunteer faculty who are now serving as "trusted resources" to the network. Meagan Liesveld, Executive Director



Pictured left to right Jennifer Gipp, Remound Wright, Meagan Liesveld, and Carole Peters.

from United Way of Lincoln and Lancaster Counties in Nebraska, shared a testimonial about working with UW NEXT volunteers who have helped her develop in her role as a new executive and assist her team with launching their planned giving program over the past year. Remound Wright, Interim Executive Director of United Way of Howard and Tipton Counties, shared insight about the interim executive leadership program and expressed his excitement for serving as an interim CEO for this local UW in Indiana. I further explained how the collaborative partnership with Third Sector Company has most recently provided three Local United Ways with the successful placements of interim CEOs in Indiana, Minnesota and California. This session showcased the

importance of UW NEXT connecting with Local UWs and the value our volunteers bring through these key resources of interim leadership, revenue diversification through planned giving and mentorships. **A special thank you to Jennifer Gipp, Remound Wright and Meagan Liesveld for their contribution to this UW NEXT learning session.**

Finding time each day to connect with local UW leaders is what filled me up. Connecting in meaningful conversation with the UWW staff and 300 local UW leaders from the 12 states represented at Great Rivers was pure joy. It was a fantastic week and was a gentle reminder of the impact UW NEXT is having on the UW network—making connections and making a difference.

A SEASON OF RENEWAL – SPRINGING FORWARD

Author: Barbara Edmond, UW NEXT Board Chair



The early months of a new year and the approach of spring always bring a sense of excitement and renewal. This is certainly the case around United Way NEXT. Many thanks to our CEO, Carole Peters, and our enthusiastic Board of Directors for jumping in and getting us off to a great 2023

start. We also extend our sincere appreciation to United Way Worldwide for the renewal of our partnership relationship and dedicated financial support. UWW CEO Angela Williams and her January 26th Town Hall paved the way for a blossoming array of UW NEXT engagement opportunities and growing attendance. Well over 100 members zoomed in live to Angela's session with another three-dozen listening to the post-session recording. In April, over 200 folks registered for our diversity, equity, and inclusion conversation on White Fragility, led by board member, Mary E. Tyler. Thank you for being a part of these powerful connection and learning opportunities. See what's ahead later in this newsletter and do make a point to join us.

In our efforts to Be the Brand, our board has expanded our numbers, adding four new members, Keith Barsuhn, Ann Fox, DJ Hampton II and Diane Lebson. Join us in welcoming them as you read about them in the pages ahead. And, we have added new committees in Marketing, Finance, and Member Segment Value/ Experience as well as reimaged our Engage and Exchange Committee (formerly Programs and Services).

In addition to new committee members, we have recruited a large cadre of Resource Development

Relationship Managers and Planned Giving/ Endowment Faculty. Thus, what's most exciting for me is that we have engaged 55 non-board members (an unduplicated count with some playing multiple roles!) to join us in this work of "harnessing the passion and experience of former and current UW leaders for the betterment of each other, the UW network, and our communities." We are grateful indeed to all these colleagues who have volunteered their time and expertise and we proudly share their names throughout this issue. And, if all that weren't enough, check out the new member section to see who else has recently joined our community. Learning what each of you is up to and hearing about the value you bring through your work and volunteer efforts is heartwarming.

I hope it will make everyone smile, as it does me, to see the many names that follow here. No matter where you are in your life's journey, you can always come home to your United Way family.

United Way NEXT.... making connections....
making a difference....building momentum!!!
Happy Spring!
All the best,
Barbara

BRIDGING THE GAP-INTERIM EXECUTIVE LEADERSHIP PLACEMENT AT UNITED WAY OF SAN LUIS OBISPO CA

United Way NEXT and Third Sector Company are thrilled to announce that Douglas Yeiser has been selected as the Interim Executive Director of the United Way of San Luis Obispo County in San Luis Obispo, California.

United Way of San Luis Obispo County strives to foster structural change by addressing root causes in order to safeguard the future of the community. Their focus is on education, income, and health – the building blocks for a good quality of life. United Way recruits people and organizations who bring the passion, expertise and resources needed to get things done.

"I'm proud to serve as the Interim CEO at United Way of San Luis Obispo County," says Douglas Yeiser. "Following the long and distinguished career of the retired CEO, the Board sought a time of transition to evaluate the organization's position in the community, affirm their role looking forward, define what they need in their next leader, and prepare a smooth entry for that new leader. I am appreciative of the Board's partnership and willingness to work together as a team to accomplish a clear set of objectives during this period."

Douglas is a graduate of Interim Executives Academy Class #12 and has over 30 years of experience leading United Ways across the country through innovation, turnarounds and mergers. He is a builder of strategic collaborations among nonprofits, corporations, governments and education for community improvement and for community disasters.

Our UW NEXT community sends our best to



Doug and our thanks to the leadership at United Way of San Luis Obispo for putting their trust in the people, teachings and programs of Third Sector Company that have served nonprofits over the past 20 years. If your local United Way is preparing for a leadership transition or succession planning, contact Carole Peters, UW NEXT CEO at Carole.Peters@uww.unitedway.org to learn more about this UW NEXT resource.

WITH APPRECIATION – A CELEBRATION OF OUR UNITED WAY NEXT VOLUNTEERS

April was Volunteer Appreciation month and the perfect time to say thank you to each and every volunteer who contributes their time and talents to make a difference for United Way NEXT. If you have an interest in getting more involved in our committee, work please let us know. We are currently looking for individuals with a finance background to join our finance committee.

UW NEXT continues to celebrate and appreciate our amazing volunteers:



Pictured top left to right/bottom left to right: UW NEXT Volunteer Faculty Leads: Ed John, Dan Dunne, Tom Brown, and Janet Clarkson Davis

United Way NEXT Board of Directors

Officers

Barbara Edmond, Board Chair
Ed Rivera, Chair Elect
Deborah Bayle, Past Board Chair
Bob Ferriday, Treasurer
Joe Tolan, Secretary

Board of Directors

Dick Aft, Emeritus
Keith Barsuhn
Carol Burger
Paul DeBassio
Susan Dunn
Ann Fox
DJ Hampton II
Robert Hines
Diane Lebson
Pete Manzo
Rob Reifsnnyder
Mary E. Tyler
James Yu
Deborah Zuloaga

2023 Work Group Chairs /Co-Chairs and Committees

Engage & Exchange

Terry Tolan
Jim Yu
Committee
Bonnie Duncan
Diane Lebson
Kevin Middleton
Charlene Mouille
Kerri Strauss
Beth Terry
Susan Eckert
Jenny Palazio
Rodney Prunty
Barb Wentworth

Diversity Equity Inclusion & Access

Jeffrey Wilcox
Deborah Zuloaga
Committee
Carol Burger
Roger Frick
Susan Gilmore
Bill Mills
David Nicole
Marc Levy
Mary E. Tyler
Anne Wilson

Member Segment Value & Experience

Ann Fox
Pete Manzo
Committee
Paula Gilberto
Edwin Goutier
DJ Hampton II
Kelli Krepps
Mary Kay Leonard
Tish McCutchen
Maureen Noe
Cynthia Round

Resource Development & Member Recruitment

Paul DeBassio
Mike Durkin
Committee
Keith Barsuhn
Toni Carlo
Nancy Dean
Robert Hines
Rob Reifsnnyder
Ed Rivera
Joe Tolan

Marketing

Susan Dunn
Committee
Deborah Bayle

Paula Gilberto
Gary Johnson
Neil Parekh
Judy Quinlan

Finance

Bob Ferriday
Committee
Benton Clark
Barbara Edmond
Ed Rivera

Nominating

Deborah Bayle
Committee
Paul DeBassio
Barbara Edmond
Bob Ferriday
Diane Lebson
Ed Rivera

Endowment and Planned Giving Volunteer Faculty

Tim Allison
Keith Barsuhn
Roma Bose
Tom Brown
Janet Clarkson Davis
Carla Crossno
Dan Dunne
Monica Estabrooke
Bob Ferriday
Denise Fleckenstein
Ann Fox
Chuck Gordon
Karsten Halusa
D.J. Hampton
Ed John
Ned Montgomery
Eve Powell
Wes Wicker
Joyce Wilbur
Rochelle Zeidman

Resource Development Relationship Managers

Dick Aft
Keith Barsuhn
Deborah Bayle
Ann Breidenstein
Toni Carlo
Nancy Dean
Paul DeBassio
Susan Dunn
Dan Dunne
Barbara Edmond
Bob Ferriday
Ann Fox
Roger Frick
Frank Hagel
Teresa Hall Bartels
DJ Hampton II
Brian Hassett
Robert Hines
Bill Hulterstrom
Ed John
Diane Lebson
Pete Manzo
Chris Martin
Maureen Noe
Nancy McClure Pinto
Rob Reifsnnyder
Ed Rivera
Joe Tolan
Dirk Van Den Bosch
Deb Walls Foster
Jim Yu
Carl Zapora
Deborah Zuloaga

WHAT'S HAPPENING WITH OUR NEW UNITED WAY NEXT BOARD MEMBERS



Keith Barsuhn

1. Tell us about yourself

I am a native New Yorker, whose family lived with grandparents in their home in Scarsdale, where German was spoken nearly as commonly as English. Growing up, I spent summers in Cape Cod and the Adirondack Mountains, and winter vacations skiing in Vermont. I have been married 36 years to Gloria, who has survived two bouts of breast cancer. We have one son, Alexander (Sasha), who we adopted from Russia at nine months. He now attends the University of South Carolina where he is a sophomore. Sasha is majoring in Global Studies and Russian and plays trumpet in marching band.

2. Describe your history with United Way
Like many New Yorkers, I answered a classified ad in the New York Times (corporate fundraiser for a major nonprofit). At UW of Tri-State, I joined the region led by Frank Karr, former UW CEO in St. Louis. He was my boss and mentor who inspired me to make United Way a career. Thanks to Gloria's support, I moved up the career ladder by being mobile. The next 36 years included six moves from the East Coast to the Midwest to the Southeast. I had executive roles leading campaigns, marketing and as a Chief Executive Officer. Most experiences included working on the transformation to the Community Impact model. It was never easy but thankfully, there were many great United Way colleagues in the network. During this time, we learned from and supported each other to be successful. In 2008, one of six individuals, I participated in the inaugural Advanced Leadership Program led by Mark O'Connell. His mentorship from that point forward was priceless toward my success as a CEO. I wrapped up my career as an Interim Executive for local United Ways. I had a career working for United Ways for 39 years. Maybe someone can help me write a book about it.

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

Ed Rivera, another great colleague, sponsored

my first membership four years ago. UW NEXT wasn't on my radar, neither was retirement. I found many former UW professionals, who I admired throughout my career, as active members. I felt as though I was home again. I learned how many of them were still active in some capacity supporting Local United Ways. It reinforced my recent aspiration to serve in an interim executive capacity. Last year, thanks to another great colleague, Susan Gilmore, I became Interim CEO of UW NEXT. It was an honor for me to serve this organization in that role, during the rebrand from UWRA.

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

I am looking forward to helping UW NEXT increase its capacity to serve the network. I think it's much needed right now. I am also looking forward to bringing in more new members, especially alumni who are still in their careers, serving United Way or elsewhere. As a consultant for Jeffrey Wilcox and Third Sector Company, I will increase the placement of former United Way executives in interim roles at the CEO and CDO level at local United Ways.



Ann Fox

1. Tell us about yourself

I have had a fulfilling career that presented the opportunity to combine my early career experience in training and

customer service with Development to help build capacity of organizations to fundraise and mentor many individual fundraisers. I have worked in smaller communities and large national organizations. In the past few years, I have transitioned away from working directly in Development. Currently, I am focusing my time on some special projects that maximize my experience.

When not working, I enjoy spending time outdoors with my husband, Bob, gardening, kayaking, hiking, downhill skiing, and playing "Chuck it" with our two Golden Retrievers. I volunteer with our local ski club and hope to start reading to children with my newly certified therapy dog Woodrow.

2. Describe your history with United Way

I was first introduced to United Way during my first professional job as Public Relations

Director of a partner agency of United Way of Berks County. I was recruited to serve on the marketing committee, and then the campaign cabinet training committee, and then...well you get the picture. After volunteering in many capacities for about 8 years, I was recruited to join the staff as the Leadership Giving Manager. I did not know the first thing about fundraising, but I did understand customer service and the value of building relationships with people.

From the day I agreed to take that position, I have learned so much about Development through the amazing network of United Way professionals (back in those days, the NAV program was in full swing!). I had the opportunity to lead a major gifts team, serve as a Resource Development VP, and work at UWA/UWW in Investor Relations and hand in hand with Community Impact staff and Brand. I left my position at UWW in 2013.

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

While I always knew about the United Way Retirees Association while working at UWA then UWW, it was not until some of my former colleagues, with whom I am still close, got involved and invited me to join that I became a member. With the rebranding work it seemed like the right time to join.

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

I am looking forward to having the opportunity to again work with people dedicated to United Way and giving back to the organization that shaped my fulfilling career.



DJ Hampton II

1. Tell us about yourself

I am an outgoing individual who loves spending time with my family, listening to live music, riding my Vespa,

hiking, and reading. Having two girls has been humbling. Sometimes I am psyched by how well we are balancing it all, and on other days I put my car key in the refrigerator and cannot find it for days. I love a challenge and am driven to succeed most when things are hard. I am at times rounder and at other times thinner. I am enjoying every minute of getting older. I view every person as a future friend, regardless of if they want to be.

2. Describe your history with United Way

I started 20 years ago as a Community Fellow sent to United Way of Central Alabama. I stayed under Dan Dunne to learn and help grow the planned giving portfolio. I had the chance to work for Ed John and Joyce Wilbur at United Way Worldwide. I met my wife (also a Community Fellow) through United Way.

I have been working as a consultant with a number of United Ways on transformation, strategic planning, and revenue strategies. In April, I accepted the role of Chief Executive Officer with Trident United Way and will be moving this summer to Charleston, South Carolina.

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

a. I worked with United Way Retirees Association when I was at UWW and was so impressed with their services and the caliber of professionals engaged. I love-love-love the idea of expanding to professionals with a United Way history, and I want to help make it a thriving reality.

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

I'm looking forward to learning from the incredible board and volunteers that I respect and admire while helping the United Way network. They are all incredible human beings and leaders!



Diane Lebson

1. Tell us about yourself

I am a philanthropic consultant based in Camden, Maine – and represent a growing demographic of United

Way NEXT members who are not yet retired. My firm, Evergreen Philanthropic Solutions, supports nonprofits across the country on capital campaigns, fundraising strategies, strategic plans, and business development – and we have the good fortune of counting a number of local United Ways as our clients. In 2021, I published a book entitled *For a Good Cause: A Practical Guide to Giving Joyfully*, which is based on my experience in leading women's giving programs and offers female philanthropists guidance on all aspects of their philanthropic engagement, from making sound donations to serving on boards to leading fundraising efforts. This spring, I will be teaching nonprofit management at the University of Maine.

2. Describe your history with United Way

I started my 17-year United Way career shortly after graduating college, working in United Way of America's (UWA's) research department. I had several other roles at UWA, including managing a national literacy grant from the John S. and James L. Knight Foundation, serving as Director of Governance where I worked with the national Board of Trustees,

and leading the national Women's Council – the precursor to Women United. I left UWA to run the major gifts effort at United Way of the National Capital Area in Washington, DC.

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

I joined the United Way Retirees Association shortly after leaving the United Way system, largely because I wanted to keep apprised of what was happening. Particularly during COVID, I found the webinars to be a great way to keep connected with the community. I have turned to several fellow members when I needed guidance in my consulting practice and partnered with others on proposals and projects.

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

Under the new United Way NEXT brand, I believe that there is a significant opportunity for the organization to connect and engage with current and former United Way professionals who have not yet retired. These folks have a lot to offer United Way NEXT in terms of time, talent, and treasure – but also, United Way NEXT has a lot to offer them in terms of community and mentorship.

NEW MEMBER SECTION

Pamela Beckford Huntington, IN

Eric Buch Belfast, ME

Glenn Cochran Lubbock, TX

Janet Clarkson Davis Rye, NH

Bonnie Duncan Lebanon, NJ

Denise Fleckenstein Bloomfield Hills, MI

Tim Henkel Spokane, WA

Patrick Jinks Irmo, SC

Mike Kerkorian New York, NY

Eva Kmiecic Quebec, Canada

Caitlin Lloyd Ocala, FL

Paul Metcalfe Freshwater NSW Australia

Lynn Pharr Maumelle, AR

Brian Quail Ft. Lauderdale, FL

Kyle Rahn Anderson, IN

Kate Reed Huntington, IN

Barbara Reinertsen Bath, ME

Dan Schiedel Enid, OK

Taylor Shead Johnson Leawood, Kansas

Lynne Smith Plano, TX

Charles Turner Daufuskie Island, SC

United Way of NW Oklahoma Enid, OK

Marshfield United Way Marshfield, WI

MEMBERSHIP RENEWAL NOTICES

Along with the name change last spring and new leadership, UW NEXT has proactively changed the way we handle annual membership renewals. For Individual Members: Renewal emails are sent based on when 2022 contributions were received, divided up by fiscal quarters. Renewal emails will be sent directly to the primary email address we have on file for each of you. Check your inbox for your annual membership notice. Approximately 30 days after the first email is sent, a reminder message will follow to ensure you did not miss this notification. If we have not heard from you following this second request, UW NEXT will mail a paper renewal notice. For Local United Ways: Contribution emails were sent by April 1 to ensure all LUWs were able to have the requests in advance of their fiscal year end. To ensure UW NEXT is included in the LUW budgets this year, we opted to send early with the hope you will make payment when it's right for your LUW budget.

Our team loves to hear from members, please let us know you have received your membership notification and to just say hello! Looking to increase your gift? Join the members who have contributed at the Leadership level.

A special shoutout to all our new members listed above and the two new local United Way members: United Way of Northwest Oklahoma (Enid, OK) and Marshfield Area United Way (Marshfield, WI).

As always, thank you to each and every member, individual and local United Way, for your generosity and support. If you have any questions about member services, please contact Christina Lawrence at Christina.Lawrence@UWW.UnitedWay.org



Pictured left to right: Resource Development and Member Recruitment Co-Chairs Mike Durkin and Paul DeBassio.

INTERIM EXECUTIVE ACADEMY GRADUATES

UW NEXT is proud to partner with Third Sector Company which provides an eight-week interim executive leadership training program throughout the year for individuals who are interested in learning about this viable career option and want the opportunity to serve the UW network. Whether interested in learning about interim leadership or simply developing your skills, this training provides excellent tools for any nonprofit professional. The training program is offered to United Way NEXT members as a benefit at a 30% discount! Interested in learning more about the cohort forming in June? Contact Joan Baumgartner Brown at JBrown@ThirdSectorCompany.com to learn more.

Congratulations to the recent Interim Executive Academy graduates: Bonnie Duncan, Bob Gragson, David Kennedy, Lynn Pharr, and Lynn Smith.



Pictured Top Left to Bottom Right Lynn Pharr, David Kennedy, Bob Gragson, Bonnie Duncan and Lynne Smith

UNITED WAY NEXT UPCOMING EVENTS

United Way National Interim Executives Roundtable

May 4 10:30am-12:00pm

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

Coffee with Carole, UW NEXT CEO

May 10 11:00am-12:00pm

Join Carole Peters, UW NEXT CEO for a virtual coffee meeting to meet the newest members of our board of directors. Our newest directors: Keith Barsuhn, Ann Fox, DJ Hampton II and Diane Lebson are excited to share their United Way stories with our Community of UW leaders.

Leadership Lessons: Reflections on 15 years of the Advanced Leadership Program

May 31 2:00-3:00pm

No matter where you are on your career or life's journey, leadership insights can always provide a source of wisdom, inspiration, and rejuvenation. Join us to celebrate the success of the Advanced Leadership Program (ALP) with Mark O'Connell, Past President & CEO of United Way of Greater Atlanta and founder of the program, and ALP grads Dona Ponopinto, President & CEO, United Way of Pierce County, Tacoma WA, and Jeff Hayward, President & CEO, Heart of Florida United Way in Orlando. Our host, Barbara Edmond, UW NEXT Board Chair, will lead a conversation of how and why this program came about, valuable leadership lessons learned, and how it has translated into positive outcomes for both work and life.

UW NEXT Member Orientation

June 15 12:00-1:00pm

Hosted by UW NEXT CEO, Carole Peters and Board Chair, Barbara Edmond, we welcome new(er) members to this interactive opportunity to connect with the UW NEXT community of UW Leaders and learn more about the member benefits and how to get involved.

Diversity, Equity and Inclusion Roundtable

The Journey of Cross-Cultural Competence: Honoring Differences and Discovering Commonalities

June 20 3:00-4:00pm

United Way NEXT is gathering members for a Diversity, Equity & Inclusion roundtable conversation centered around The Journey of Cross-Cultural Competence: Honoring Differences and Discovering Commonalities. Join UW NEXT for this virtual roundtable featuring guest speaker Marc Levy, UW NEXT member.

Planned Giving Learning Session and Office Hours

June 22 4:00-5:00pm

This session will include a valuable learning session entitled "Making The Ask" led by Ned Montgomery and Rochelle Zeidman, UW NEXT Endowment and Planned Giving Volunteer Faculty. The session will be facilitated by Dan Dunne, Former CEO of the United Way of Birmingham, AL.

CEO Circle

May/June 2023

CEO Circles are forming now! This is an opportunity to connect with colleagues across the country in a safe space to ask questions, gain insight and learn from United Way peers. This session will be led by UW NEXT members Deborah Bayle, Former President & CEO of UW of Salt Lake City, and Mike Durkin, Former President and CEO of The United Way of Massachusetts Bay and Merrimack Valley.

Please join us at any of our upcoming events! To learn more, check out our "Events" tab at UnitedWayNEXT.org or email [Katelyn Guest, Program Marketing Associate, at Katelyn.Guest@UWW.UnitedWay.org](mailto:Katelyn.Guest@UWW.UnitedWay.org)

A special THANK YOU to our corporate partners Mutual of America and Procter & Gamble.

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LET'S GET SOCIAL -MAKING CONNECTIONS!

Join us on social media! Stay updated on all things United Way NEXT and get connected with our community of United Way leaders!

LinkedIn Page: United Way NEXT [LinkedIn](#)

LinkedIn Group: United Way Professionals and Alumni [LinkedIn Group](#)

Facebook Group: United Way NEXT [Facebook](#)

Instagram: [@United_Way_NEXT](#) [Instagram](#)



THE WAY OF UNITED WAY

Author: Dick Aft, United Way Historian & United Way NEXT Emeritus Board Member



What is the **Way** ... the process through which “the United Way movement” has mobilized caring individuals, families, organizations and businesses over three centuries? Simply stated, it’s a repeating four-step cycle in which volunteers, professionals, contributors, human service agency leaders and clients, have worked together to:

- Identify human service gaps and duplications and develop plans to meet them
- Articulate “cases” to support implementation of the plans
- Mobilize efforts to identify and develop resources of volunteer time, money and public policy influence
- Invest the yield of these efforts

All of this has been done as changes in social, economic, political and economic environments have challenged leaders to come up with new or modified tools to fulfill their common mission. By sharing and adopting locally developed “best practices,” members of the United Way network have continuously adapted to changes beyond their control.

Identifying gaps and duplications and plans to meet them.

1877 Boston’s religious institutions regularly ran out of food, shelter and clothing, largely due to “double dipping” by enterprising families who presented their needs to

multiple charities. Social service exchanges, Information & Referral Services and “911” grew from these roots. The UCFCA [United Community Funds & Councils of America] Institute for Community Studies, headed by Merrill Krughoff, became a common resource for the involvement of powerful local stakeholders in developing consensus on the needs for and plans to “double campaign results and re-constitute agency membership.” During the 1980’s Paul Cherney, along with United Way of America’s George Wilkinson, introduced Mobile, Alabama’s approach to Environmental Scanning to the field. This method of bringing together local United Way stakeholders to share their perspectives on external impacts of the social, economic and business conditions on agency and client needs became an industry standard practice for over a decade.

Articulating “cases.”

Canada’s 1982 recession, the worst since the Great Depression of 1929, inspired Vancouver’s Centraide campaign director Bob Myers to create “CAN-DO” [Campaign Analysis Now Developing Objectives]. It was a tool to analyze all relevant data and form the rationale for increased resource development. Responding to increased public demand for measurable results with questions such as “How come you ask for more money every year and the problems never go away?” leaders of Minneapolis, Columbus, Ohio and Cincinnati United Ways, along with many others, devised what became the 21st century Impact Agenda. It was a case for focusing resources and measuring United Way results.

Mobilizing efforts.

Frances Jacobs, representing Denver’s Hebrew Ladies Relief Society, and the 1887 leaders of Denver’s religious denominations are credited with organizing the United States’ first Charity Organization Society, a united WAY of raising money for a variety of charitable enterprises. In 1913, Cleveland mayor Newton D. Baker led the creation of the Federation of Agency Campaigns. It served as the WAY to most efficiently mobilize financial

resources and is recognized as the “first modern” United Way. Community Chests, War Chests, United Funds, Appeals, Crusades and similarly named local organizations followed suit. During the 1970’s, United Way of America led common branding among its “members” under the United Way name and helping hand logo.

Investing the yield.

Responding to returning G.I. demands for a process of “Citizen Review” to distribute financial resources, the Detroit Community Chest changed its agency-negotiated method of investing resources to “Citizen Review Budget Committees” in 1949. Over the next seventy years, similar local agency budget and program review groups morphed into “Allocation Panels” and “Investment Teams.” All depended on volunteers to distribute financial, and sometimes material, resources to agency members/partners.

What’s Next?

An exciting model for “Thriving United Way” is currently under construction by the Network under United Way Worldwide’s leadership. The purpose of the Thriving United Way framework is to describe and promote the key factors that exemplify a successful United Way and positively change how the Network works together – across the globe – to support one another, share best practices, and collectively drive meaningful impact in all the communities we serve.

Bob Dylan sang, “The times, they are a-changin’,” an understatement during this period of environmental and technological sea change. But as United Way leaders have observed in three centuries, “We were invented for times like these.” The words of today’s UWW Statement of Mission sum it all up: “United Way brings people together to build strong, equitable communities where everyone can thrive.” That continues to be the Way of United Way!

PRIMARY REFERENCES: People & Events, A History of the United Way, compiled based on the research of Elwood Street, 1977; What Lies Ahead, United Way Strategic Institute, 1989, Colorado Givers, A History of Philanthropic Givers by Thomas J. Noel, 1998 and Managing Transition, Making the Most of Change by William Bridges, 1991.

PART 2: INSIGHTS: BEING A GOOD COMMUNITY CITIZEN

Author: Barbara Edmond

Last December, our newsletter featured Part 1 of INSIGHTS: Being a Good Community Citizen with a promise to share the second part in this edition. One might recall that Barbara Edmond hosted this session at the request of United Way CEO, Renee Moe in Dane County, Madison, Wisconsin for an upcoming United Way Executive Leadership training. Barbara encouraged our community of UW Leaders to share their valuable insights to help influence this resource for the United Way network leaders who would benefit. Below is part 2 of this INSIGHTS article.

With State and National United Way Colleagues

- *United Way is like a nationwide family. Whether you personally know someone or not, you can always reach out.*
- *It is often said that the first 6 months as a new United Way leader can be the loneliest ever. When a new United Way leader arrives in your state or region, be among the first to reach out and welcome that person. Offer to be available for support, to answer questions, provide authentic perspectives, or simply to bounce off ideas.*
- *Offer a potential mentoring relationship to a new United Way leader moving into your region/state, if that is something they might value. (With caution, this could also be offered to a new nonprofit executive in your community) Some Advice About Mentoring: #1 Take on no more than two mentorships at a time; Could do this for up to one year; Invoke the "Vegas" rule... "what is discussed in this relationship stays within this relationship." I much appreciated it when someone offered to mentor me/or simply be a friendly ear and I always try to pay it forward. #2 Always conduct a check-in re your knowledge of the mentee's local community culture. The way you would advise a United Way CEO in Seattle is very different than what one might advise a CEO in Louisville. Content is important ... culture is everything when you are a United Way leader.*
- *If no one makes the step to approach you as a new executive, take your own initiative. Feel free to connect with surrounding UWs, your state organization, UWW, or United Way NEXT for a good mentor recommendation. It is always good to have someone you can call on. Anticipate the unexpected – you can't possibly know all that is coming your way and you don't need to carry the burden alone. Call on your colleagues or volunteers for help to get you through.*
- *When you are new to a community and don't know anyone there, start by intentionally seeking to make meaningful connections with members of the search committee who recruited you. They can help you navigate during your early days, and they can become a place of psychological safety – a support system that you can rely on, that will be up-front with you and help you navigate potential community landmines as well as make sure you are taking care of you.*
- *Attend as many UW state organization/association meetings as possible - these people will play an important role in helping you solve the challenges you will be facing.*
- *Look for ways to collaborate with other United Ways in your state or region (Chambers & community foundations too!). This demonstrates the benefit of supporting United Way to your community and what an asset the organization is.*
- *If you have a great volunteer moving to a new community, both for the volunteer's benefit but also as a good system citizen, always write, first by letter and later by email, to the United Way CEO in the other community to introduce the person who is coming there and connect them to each other. It lets the UW CEO know that they have someone with a strong commitment and past with United Way coming their way and lets the volunteer already know someone in the community to reach out to when they arrive.*
- *Likewise, when a new leader comes to your town, learn what community they came from. Then, feel free to contact that local UW CEO to find out what they might know about your new community leader and potentially their past involvement (or not) with United Way. If there was a close relationship with that UW, this could provide a great entry point to meeting the new leader and an instant topic of conversation.*
- *A True Tale: A national corporate partner was in the middle of a scandal and getting some very bad press. There was an internal debate about whether or not to distance United Way from them. The employee campaign was highly designated, but the corporation provided local UWs across the nation with the single largest unrestricted corporate gift (\$16 million) as well as beginning to make some additional investments in key impact strategies. The decision: Take out a full-page ad in USA Today thanking the company's employees for their support of the community through the United Way. The idea was to focus on the employees, not the company and help the beleaguered employees to feel proud of themselves for the good that they had done. This gesture did not go unnoticed and within a year, UW received an additional \$16 million unrestricted corporate gift as well as selection as a partner in a major impact program. Also, when the federal government required some divestiture of stock as a penalty, the United Way became a beneficiary.*

Additional Pieces of Wisdom for New Executives

- *Talk to as many people as you can in your first year to better understand the community you are serving ... its strengths and challenges as well as to learn how the United Way is perceived in the community.*
- *If you become CEO from within the organization, reintroduce yourself to community leaders as though you are new to the community. Make calls on corporate leaders, reintroduce yourself in a new light, ask about and talk about a vision for the future.*
- *Ask provocative questions: How do we keep community alive? How do we get to know one another? How do we achieve extraordinary things as ordinary people, which is part of our United Way tradition, and a new definition of community which is often technologically based?*
- *If you don't ask, the answer is always no.*
- *Use your rearview mirror. Leadership is like driving a car. Most of the time you look ahead to see what's in front of you. But occasionally, it is a good idea to look behind at what has happened in the past and also to see who's gaining on you. What happened in the past is important and can often better inform what needs to happen in the future. Don't be afraid to reach out to past leaders or other colleagues who may have worked in your new community and have moved on. They likely have some valuable insights to share.*
- *Do keep your eye on the future but be sure to honor and build on the successes and lessons of the past. You may be new to the community/job and are rightly focused on new and different ideas. But remember that your volunteers, staff, and community leaders have been there, have a vested stake, and a sense of pride about what has come before.*
- *When previous leadership may not have been held in high esteem, the very first thing to do is start making calls to ask what we could do better from their experience in the past. Truly listen and learn from those mistakes, and also from any wins described!*
- *Six degrees of separation is real. Talk positively about everyone you associate with.*
- *A suggested way of operating: We generally have a high road reason and a low road reason for doing what we do. The high road reasons are public but remember that our low road reasons should often be pretty private.*

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