



United Way of
Southwestern Pennsylvania

A Commitment to
Community

A Commitment to Community

Our mission

United Way of Southwestern Pennsylvania serves Allegheny, Butler, Westmoreland, Fayette and Armstrong counties by leading and mobilizing the caring power of individuals, the business community and organizations to help local people in need measurably improve their lives. United Way creates long-lasting change for the betterment of our community.

United Way of Southwestern Pennsylvania has built decades-long meaningful relationships with community partners committed to serving those in need. From corporate leaders to philanthropists, human-services agencies, donors and volunteers, we unite those who proactively address the big issues facing our community and its most vulnerable residents. Only together can we achieve real change and work toward a greater good for us all.

Your support of the **Impact Fund** helps tackle some of the biggest issues facing our community. Efforts address four critical areas including:



United for
Children



United For
Struggling Families



United for
Seniors



United for People
with Disabilities

These impact areas span issues that affect families, neighbors and, ultimately, the future of our community. With your support, we're able to lead the change and fund initiatives that create lasting impact throughout the most underserved parts of our community. Your partnership with United Way of Southwestern Pennsylvania today will make real change possible for years to come.

Make a commitment to your community.

The Impact Fund



Leadership that drives measurable, lasting impact.

Your gift to the Impact Fund provides the highest value for your donation. It is the most effective way to achieve the greatest impact on the lives of our most vulnerable neighbors.

The Impact Fund

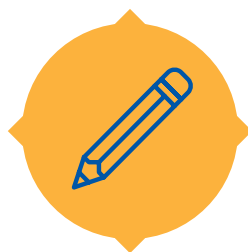
Creating the most direct and lasting impact for our community.



Helping Financially Struggling Families

To meet basic needs, improve employment opportunities and recover from crisis.

Resulting in more than 40,000 inquiries for basic needs met and over 118,000 lives impacted by United Way's 2-1-1 helpline.



Helping Children and Youth

To succeed in school and beyond by helping them learn and develop meaningful skills.

Resulting in more than 56,000 children receiving access to quality out-of-school programs that strengthen crucial academic and character-building skills.



Helping Seniors and Their Caregivers

To provide them with support and human assistance to reduce feelings of loneliness and isolation.

Resulting in 42,618 seniors able to meet basic needs and find fulfillment and security living at home.



Helping People with Disabilities

To improve access to employment, advancement opportunities and social connection.

Resulting in nearly 3,000 people with disabilities gaining competitive and meaningful employment through ten employers since 2013.

Your gift to the Impact Fund has the power to be multiplied many times over, thanks to the combined efforts of thousands of volunteers, hundreds of partnerships and our community as a whole.

GIVE. ADVOCATE. VOLUNTEER.
MAKE AN IMPACT.



United Way of
Southwestern Pennsylvania

United Way of Southwestern Pennsylvania
serves Allegheny, Butler, Westmoreland,
Fayette & Armstrong Counties.

Leadership Opportunities



Leadership that starts with you.

Whether you're looking to have a strong voice or simply want to be more involved, United Way has leadership opportunities that can be tailored to your interests.

Leadership Opportunities

When you choose to become a United Way leader, you join a team of committed problem-solvers taking on our region's toughest human service challenges. With a passion to make the whole community stronger, our leaders are volunteers, committee members, board members, corporate partners and donors who champion our work.

Take an active role in how your dollars go to work in the community. Have a seat at the table and create positive change by:



Volunteering based on your interests

- Volunteer at select events
- Help identify and connect new donors
- Join a Leadership team or committee for a particular area of work



Being part of solving our region's most critical issues

- Learn more about pressing human service issues facing our community
- Guide United Way's strategic approach to solving community issues
- Advocate for change by influencing public policy



Networking

- Forge relationships with like-minded, influential community leaders
- Be a part of exclusive special events (access changes depending on giving level)

Becoming a committee or initiative lead can be a highly satisfying experience. Enjoy getting closer to the work and the people we serve. See first-hand how your money makes a difference to the lives of people in need.

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Our Strategic Approach



A commitment to creating a lasting impact.

At United Way of Southwestern Pennsylvania, we take the investment of donor dollars very seriously. Our process ensures your contribution to the Impact Fund has maximum impact where it's needed most.

Our Strategic Approach

When you contribute to the Impact Fund, you contribute to solving problems that are so much bigger than ourselves. Join an organization that brings together all the right partners in corporations, government, foundations and agencies to take action and address our communities' greatest needs.



We work with community leaders to identify the most critical needs.



We fundraise for effective, lasting solutions.



We select strategies/agencies capable of making the greatest impact.

OUR WORK HAS FOUR KEY DRIVERS:

1

INNOVATION

Tackling community issues with new ideas, technologies and forward-thinking.

2

COLLABORATION

Bringing together our region's best business and community leaders for the greater good.

3

EFFICIENCY

United Way of Southwestern Pennsylvania spends just 12% of donor dollars on administrative fees. The national averages is 35.*

4

EFFECTIVENESS

Addressing the root causes of systemic problems through strategic guidance of resources and service providers.



*Source: Better Business Bureau's Wise Giving Alliance.

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Accountability Report



A commitment to the highest standard.

United Way of Southwestern Pennsylvania remains committed to a high standard of transparency and accountability.

Accountability Report

We take our role as a trusted leader in the community very seriously. Each year, our generous community gives, advocates and volunteers to improve the lives of our neighbors. Funds are allocated to where they'll do the most good, helping people who need it most. Learn more about our work at www.uvswpa.org.



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United Way of Southwestern Pennsylvania

Impact Fund Partner Agencies



**A commitment to working with the
highest-performing organizations that
consistently produce measurable results.**

Impact Fund Partner Agencies

Thanks to your support of United Way's Impact Fund, these agencies have been identified—through a competitive process, careful vetting and site visits—as best able to help the greatest number of people. To receive funding, agencies are required to collaborate and demonstrate measurable results, ensuring the most efficient use of resources and a holistic approach to addressing our community's problems.

ALLEGHENY COUNTY

A+ Schools

ACHIEVA Family Trust with: Autism Connection, PA Health Law Project, PA Office of Vocational Rehabilitation, NAMI of SWPA, AHEDD

ACTION-Housing with: Allegheny County Department of Economic Development (ACED), Court of Allegheny County - Fifth Judicial District of Pennsylvania, Municipality of Penn Hills and the Department of Planning and Economic Development, Neighborhood Legal Service Association (NLSA), Operation Better Block, PAServes - Greater Pittsburgh, The Housing Partnership Network (HPN), The Pennsylvania Housing Finance Agency (PHFA), Nazareth Housing Services, Rebuilding Together Pittsburgh, The Pittsburgh Project, Auberle 412 Youth Zone

American Red Cross SWPA Chapter

Bethlehem Haven with: Area Agency on Aging, Neighborworks, North Hills Community Outreach

Boys and Girls Clubs of WPA with: Melting Pot Ministries, Partner4Work, ReadyAI

Catholic Charities, Diocese of Pgh with: Allegheny Links, Catholic Charities Free Health Care Center, The Greater Pittsburgh Community Food Bank

Center of Life

Community Human Services Corp with: Allegheny County Department of Human Services, North Hills Community Outreach, Veterans Leadership Program, SpotLaunch LLC, DHS Office of Community Services, Temple University Institute on Disabilities

Community Kitchen Pittsburgh with: Allegheny County Jail Collaborative/ Reentry Program, Hill House Passport Academy Charter School, Pittsburgh Public Schools CTE-Culinary, Youth Places

Homewood Children's Village with: Makers Clubhouse (Bible Center Church), Higher Achievement Program, Inc.

Human Services Corporation with: Woodland Hills School District

Jewish Community Center of Greater Pittsburgh with: Jewish Association on Aging, Jewish Family & Community Services

Jewish Family & Community Services with: Allegheny County Library Association, Carnegie Library of Pittsburgh, North Hills Community Outreach, South Hills Interfaith Movement, PA 2-1-1 SW, Intersection, McKeesport, Jewish Assistance Fund (JAF), Rainbow Kitchen, UPMC, Urban League of Pittsburgh, Autism Connection, Office of Vocational Rehabilitation, Duquesne University, Point Park University

Just Harvest with: Allegheny County Health Department, Farmers Market Coalition, Pittsburgh Food Policy Council, The Food Trust, United Way - Free Tax Program, Various

KidsVoice

Macedonia FACE with: Hill District Center for Nurturing Families, Hill District Federal Credit Union, JobLinks, McCreery Group, Oakland Planning & Development Corporation

Mon Valley Initiative with: Neighborhood Legal Services, Rainbow Kitchen, Travelers Aid

Neighborhood Learning Alliance with National Society of Black Engineers, CMU, Carlow University, CCAC

Neighborhood Legal Services Association with: Allegheny County Human Services Department, Jones Day, Pittsburgh Pro Bono Partnership, University of Pittsburgh Community Engagement Centers

Northern Area Multi Service Center with: ACCESS Transportation Systems, Inc., Catholic Youth Association, Eastern Area Adult Services, LifeSpan Senior Services, Plum Senior Community Center, Riverview Community Action Corp., The Thorne Group, Inc., University of Pittsburgh School of Public Health, Macedonia FACE

North Hills Community Outreach

Providence Connections with: Allegheny County Department of Human Services, Allegheny Intermediate Unit, Children's Hospital of Pittsburgh, Council of Three Rivers American Indian Center, Family Resources, Focus on Renewal, Kingsley Association, Primary Care Health Services, South Hills Interfaith Movement, Trying Together (formerly PAEYC), University of Pittsburgh Office of Child Development, Urban League of Greater Pittsburgh

Salvation Army of WPA

South Hills Interfaith Movement with: National Financial Educators Council (NFEC), North Hills Community Outreach (NHCO)

Travelers Aid Society with: ACCESS Transportation, Bethlehem Haven, Community Kitchen Pittsburgh, Jewish Family & Community Services, North Hills Community Outreach, Northern Area Multi Service Center, Wesley Family Services, Women's Center & Shelter, YWCA, UPMC Staying-at-Home

Urban League of Greater Pittsburgh with: CCAC (4 sites), Gareld Jubilee Association, Goodwill of Southwestern Pennsylvania, Manchester Bidwell, New Century Careers, YouthBuild

Veterans Leadership Program with: Department of Veteran Affairs, Dress for Success, Habitat for Humanity, Homeless Children Initiative, Homeless Children's Education Fund, Neighborhood Legal and Jones Day, Off the Floor, Operation Troop Appreciation, Tickets for Kids, Travelers Aid, Treasure House, Wesley Family Services, Women Veterans Health Services, Eat n' Park, Giant Eagle, West Penn Hospital, ACTION Housing, Smallman Galley, Disabled American Veterans, Team Red, White and Blue, Mission Continues

Vintage with: CCAC, Jefferson Regional Foundation

Wesley Family Services with: Independent Family Resource Group, Mon Valley Initiative, Western PA Diaper Bank, North Hills Community Outreach, AgeWell Pittsburgh, Travelers Aid, University of Pittsburgh Occupational Therapy, Brightwood Center Institute Occupational Therapy Assistant

Women's Center & Shelter with: AHRCO - Allegheny Housing Rehabilitation Corporation, CHS - Community Human Services, ISAC - Immigrant Services and Connections, Off the Floor, PNC Bank, Pennsylvania Women Work, Traveler's Aid, United Way

YMCA of Greater Pittsburgh with: YWCA Greater Pittsburgh

YWCA of Greater Pittsburgh with: Center for Women (CFW), Neighborhood Legal Services Association (NLSA), Carnegie Science Center

IMPACT FUND-supported United Way Community Initiative Partners:

Allies for Children

Blind and Vision Rehabilitation Services

Boy Scouts of America, Laurel Highlands Council

Program to Aid Citizen Enterprise

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BUTLER COUNTY

YWCA Butler with Catholic Charities, Center for Community Resources, Butler County Children & Youth, VOICE, Family Pathways, The Lighthouse Foundation, Butler County Children's Center, Jean B. Purvis Community Health Center

Glade Run Lutheran Services with American Horticultural Therapy Association, Autism Connection of PA, Butler Collaborative for Families, Cranberry Diversity Network/Special Needs Coalition

The Arc of Butler County with Butler Area High School

Jean B. Purvis Community Health Center with Center for Community Resources, Catholic Charities, Adagio, My Choice, Mental Health Association, Gaiser Center, University of Pittsburgh Dental School.

Butler County Children's Center, Inc. with Early Intervention Providers in Butler County, Butler County Human Services, Center for Community Resources Early Intervention Service Coordination Unit, Midwestern IU IV and Arin IU28

The Lighthouse Foundation with Adagio Health, Butler County Children's Center, Butler County Housing Authority, Butler County Human Services, Butler Memorial Hospital, Careerlink, Catholic Charities, Center for Community Resources, Gaiser Center, Family Pathways, Grapevine Center, Office of Vocational Rehabilitation, Greater Pittsburgh Community Food Bank

Center for Community Resources, Inc. with BERI, Salvation Army, Saint Vincent DePaul, Catholic Charities, Slippery Rock University

Lifesteps with Area Agency on Aging, Butler Hospital, community business partners

Community Care Connections, Inc. with Butler County Children's Center

Connecting2Tomorrow, Inc. with Butler County 4H, StandTall, JusticeWorks Youth Care, Adagio Health.

Catholic Charities of the Diocese of Pittsburgh Inc. with Butler Collaborative for Families, Butler County Assistance Office, Butler County Children & Youth, Butler County Community Action, Butler County Human Services, Center for Community Resources, The Lighthouse Foundation, My Choice, Family Pathways, New Beginnings Free Methodist Church, Office of Vocational Rehabilitation, PA Career Link, Salvation Army, St. Vincent DePaul, VOICE

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WESTMORELAND COUNTY

Adelphi with Westmoreland Museum of American Art, Westmoreland/Fayette Workforce Investment Board, Economic Growth connection of Westmoreland, Remake Learning

Big Brothers Big Sisters of the Laurel Region

Blackburn Center with All Westmoreland County school districts and private schools, Westmoreland County Children's Bureau, PERSAD, VERA Institute

CASA of Westmoreland, Inc. with Westmoreland County Children's Bureau, Westmoreland County Court Administration, family court judges, Statewide Adoption & Permanency Network (SWAN), Westmoreland County juvenile probation, Westmoreland Bar Association, Westmoreland Community Action

Crime Victims Center of Fayette County with Penn State Extension

Greensburg YMCA with Greensburg-Hempfield Area Library, Greensburg Salem School District, Central Westmoreland Career & Technology Center, Hempfield Area School District, Yough School District

HAVIN Inc. (Helping All Victims In Need) with Alle-Kiski HOPE Center, Blackburn Center, LINK to Aging and Disabilities Network, Mental Health First Aid USA, Apollo Ridge School District, Milton Hershey School

Mental Health America of SWPA with St. Vincent Prevention Project, Westmoreland Casemanagement, Westmoreland County Behavioral Health/Developmental Services, Juvenile Detention, Veterans Affairs

Valley Points Family YMCA with People's Library New Kensington, New Kensington-Arnold School District, Burrell School District, Kiski Area School District, Allegheny County Food Bank

YMCA of Uniontown Area with St. John's School

YWCA of Westmoreland County with Greensburg-Hempfield Area Library, City of Greensburg Recreation Department, Welcome Home Shelter

American Red Cross of Chestnut Ridge

Blackburn Center with Welcome Home Shelter, Laurel Legal Services

Blackburn Center with Westmoreland County Assistance Office, Westmoreland County Housing Coalition, Local Housing Option Team, Westmoreland County Food Bank, Welcome Home Shelter, Laurel Legal Services

Catholic Charities of the Diocese of Greensburg with Westmoreland Community Action, Fayette County Community Action, WIC, Westmoreland County Housing Authority, Fayette County Housing Authority, Area Agency on Aging, Salvation Army

Central Westmoreland Habitat for Humanity with City of Greensburg and Westmoreland County Land Bank & Redevelopment Authority, Community Foundation of Westmoreland County

Connect, Inc. - Welcome Home Shelter with Catholic Charities, Westmoreland Community Action, Union Mission, Westmoreland County Community College, Bethlehem Project, Excela Health, Area Agency on Aging, Feeding the Spirit

Domestic Violence Services of Southwestern PA with PA Coalition Against Domestic Violence, PA Commission on Crime & Delinquency, SWPA Legal Services, Homeless Providers Coalition, HUD Homeless Coordinated Entry System

Fayette County Community Action Agency, Inc with WIC, CYS & Safe Care Team, Cornerstone Care.

Fayette County Community Action Agency, Inc. with WIC, Meals on Wheels, 49 pantry locations, Nutrition Education Program, Repulic Food Enterprises Center (RFEC)

Feeding the Spirit with WCSI, Catholic Charities, local ministerium, SPSHS Welcome Home Shelter, Union Mission, Westmoreland Community Action, Blackburn Center, Westmoreland County Assistance Office, Westmoreland County Housing Authority, Veterans Affairs

HAVIN Inc. (Helping All Victims In Need) with Armstrong County Multi-disciplinary Team, Violence Against Women Task Force, Criminal Justice Advisory Board, local housing authority, FISA Foundation, Healthcare Consortium, Department of Human Services, Homeless Information Management System

New Century Careers Inc. with Westmoreland/Fayette Workforce Investment Board, Eastern Westmoreland Career and Technology Center, Occupational Advisory Committee (comprised of reps from local manufacturers)

Union Mission with Excela Health, PIC, Westmoreland County BDHS, Westmoreland County Food Bank, Career Link, Catholic Charities, Westmoreland Community Action, SPSHA Welcome Home Shelter, Threshold, local ministerium, local grassroots groups

Wesley Family Services with LICC, the PACT Program, Community Services Block Grant Advisory Board, New Kensington Arnold School District, Greensburg Salem School District, Greater Latrobe School District

Wesley Health Center, Inc. with Connellsville Chamber of Commerce, Scottsdale Chamber of Commerce, Connellsville Community Ministries, Connellsville Food Bank, Westmoreland Food Bank, Fayette County Community Action Agency, PA Department of Health, Fayette County Cultural Trust, City Mission - Uniontown, Uniontown Hospital, Frick Excelsa Hospital, UPMC, and Highlands Hospitals, Lion's Club International, Multiple Dentists that Volunteer

Western PA Diaper Bank with National Diaper Bank Network, PACE, Pittsburgh Food Bank, Urban League, Westmoreland YWCA, Alle Health Network, TriCity Life Center, Westmoreland Community Action, Early Learning Resource Center

Westmoreland Community Action with SWPA 211, IRS VITA grant, Pathways PA, Community Foundation of Westmoreland County, Greensburg Rotary, WCSI, Westmoreland County Food Bank

Westmoreland Community Action with Westmoreland County Community College, YMCA childcare, WIB, Blackburn Center, Excela Health

Westmoreland County Food Bank, Inc. with Westmoreland Community Action, Penn State Extension, school districts, Area Agency on Aging, VOAD, SWPA Food Security Partnership

ACHIEVA with Parent to Parent of Pennsylvania, Westmoreland Intermediate Unit

Center for Hearing & Deaf Services, Inc. - Westmoreland with Excela Health Network, Allegheny Valley Health Network, school districts, Seton Hill, Saint Vincent, Penn State, Area Agency on Aging

Center for Hearing & Deaf Services, Inc. - Westmoreland

Blackburn Center with Area Agency on Aging, WCSI, Westmoreland County BHDS, Senior Helper, OYHS, Center for Active Adults, ACHIEVA, Elder Abuse Task Force

Interfaith Volunteer Caregivers of Fayette, Inc. with SWPA Legal Services, Apprise, Fayette Area Coordinated Transportation (FACT)

Laurel Area Interfaith Volunteer Caregivers, Inc. with Seton Hill University, Saint Vincent College, Hospital to Home

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Our Board of Directors



**A commitment to leadership
that guides the way forward.**

We are guided by a distinguished group of local leaders who provide strategic leadership and direction for the organization.

Our Board of Directors

United Way of Southwestern Pennsylvania's Board of Directors is comprised of some of the brightest minds from the business community. These individuals work together toward a common goal of making sure your investment has the greatest impact on our neighbors.

Richard J. Harshman * – Board Chair
Community Volunteer
(Retired from ATI)

Will Allen
Founder
Will Allen Foundation

Kenneth Altemus
Vice President, Global Nuclear Fuel
Engineering & Nuclear Replacement Parts
Westinghouse Electric Company

Josie Badger, DHCE, CRC
President
J. Badger Consulting

Leroy M. Ball
President & CEO
Koppers, Inc.

John A. Barbour *
Executive Chairman
Buchanan Ingersoll & Rooney PC

Bibiana Boerio +
Community Volunteer

Kenyon R. Bonner, Ed.D. *
Vice Provost and Dean of Students
University of Pittsburgh

Kenny Bonus, CPA ^
Principal and CEO
Bonus Accounting

Brooks Broadhurst *
Eat'n Park Hospitality Group, Inc.

Christine Bryant
SVP, Coatings, Adhesives and
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Schneider Downs

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President, Pittsburgh and SW PA, PNC Bank
The PNC Financial Services Group, Inc.

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Deloitte LLP

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UPMC

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Community Volunteer
UPMC Retiree

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Howard Hanna Insurance Services

George J. Farah +
Vice President, Utility Services
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Reverend Glenn G. Grayson, Sr.
President & CEO
Center that CARES

Gretchen R. Haggerty *
Community Volunteer
(Retired from U.S. Steel)

Hayley A. Haldeman
Interim Executive Director
Mattress Factory

Cain A. Hayes
President & CEO
Gateway Health

Diane P. Holder
President & CEO
UPMC Health Plan

Cynthia Hundorfean
President & CEO
Allegheny Health Network

Shane Jakubovic *
Project Manager, Organizational Initiatives
Covestro LLC

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Chief Executive Officer
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Pittsburgh Office Managing Partner &
Midwest Advisory Market Leader
PwC

Rebekah Byers Kcehowski
Administrative Partner, Pittsburgh Office
Jones Day

Katharine Eagan Kelleman
Chief Executive Officer
Port Authority of Allegheny County

Darrin Kelly
President
Allegheny/Fayette Central Labor Council,
AFL-CIO

John P. Kline +
Executive Vice President, Chief Lending
Officer
Standard Bank

Timothy M. Knavish
Senior Vice President, Architectural Coatings
and President, PPG EMEA
PPG

Jeffrey M. Krakowiak
Senior Vice President, Marketing &
Commercial Operations, Electrical Sector
Eaton Corporation

Elizabeth E. Krisher, CPA * +
President and Managing Partner
Maher Duessel

* Executive Committee member + Westmoreland/Fayette County representative ^ Butler County representative

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Karen L. Larrimer *
Head of Retail Banking & Chief Customer Officer
The PNC Financial Services Group, Inc.

Dan LaVallee * ^
Director of Government and Business Relations, Government Programs
UPMC Health Plan

Michael T. Lordi +
CEO
Elliott Group

Jeff Mallory, Ed. D.
Executive Vice President & Chief Operating Officer
Saint Vincent College

David J. Malone *
President & CEO
Gateway Financial

Tamra E. Minnier, RN, MSN, FACHE
Chief Quality Officer
UPMC

Morgan K. O'Brien *
President & CEO
Peoples Natural Gas

Julie A. Patter *
Attorney
Dentons Cohen & Grigsby, P.C.

Ron Port +
Vice President & Chief Commercial Officer
Kennametal, Inc.

Deborah L. Rice-Johnson *
President
Highmark, Inc.

Arthur J. Rooney II *
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Pittsburgh Steelers Sports, Inc.

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Partner
Reed Smith LLP

Hari Sastry
Senior Vice Chancellor & CFO
University of Pittsburgh

Shannon Schreib ^
Talent Acquisition Diversity Advisor
MSA

James R. Segerdahl
Global Managing Partner
K&L Gates

Wendy Etheridge Smith, Ph.D.
CYF - Prevention and Community Services
Allegheny County Dept. of Human Services

Mekael T. Teshome
Vice President & Senior Regional Officer
Federal Reserve Bank of Cleveland - Pittsburgh Branch

David Thuma
Executive Vice President & Chief Marketing Officer
The PNC Financial Services Group, Inc.

Mark A. Twerdok
Managing Partner
KPMG

Thomas L. VanKirk, Esq.
Executive VP, Chief Legal Officer, and Secretary
Highmark Health

Most Reverend David A. Zubik *
Bishop
Diocese of Pittsburgh

* Executive Committee member + Westmoreland/Fayette County representative ^ Butler County representative

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United Way Life™



A commitment to leaving a legacy.

United Way Life insurance policies are powerful legacy gifts
that multiply your impact on the community.

United Way Life™

A Once in a Lifetime Gift. Looking forward, there may be no better way to leave a lasting impact on our community than through United Way Life. This insurance policy gives donors an easy, affordable way to create a legacy of change. By making United Way your beneficiary, your gift will continue to grow in impact for decades to come.

**5-8x
MORE
VALUABLE**

Unlike a traditional donation, United Way Life™ is a gift that multiplies in value—as much as 5 to 8 times the cost of the insurance premium paid by the donor. You can leave a legacy that can make an immeasurable difference in the local community.

Pay a Little, Give a Lot.

- The cost of the gift, paid as a premium, is multiplied substantially when United Way receives the policy payout.
- The premium payment is further offset by 50% matching dollars made possible by a generous United Way donor (up to \$2,500 per year, per donor).
- A portion of the policy premium is also tax deductible.

Add United Way Life to your Giving Strategies.

- Creating a life policy is easy and affordable.
- You can get a policy of \$250,000 or more with your own agent or directly through United Way, in just a few simple steps.
- You can pay the premium over five years, or you can choose to pay in full up front.
- You can add multiple lives to the policy.
- United Way Life giving does not disrupt your current estate plan.

Your Leadership Counts Today and Into Tomorrow.

Your investment will be a vehicle for the future, improving lives for those who need it most. But your gift of over \$250,000 will be recognized today, with a membership into United Way's Million Dollar Roundtable, a worldwide movement of forward-looking leaders extending their impact for generations to come.

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Planned Giving



**A commitment to strengthening
the community for good.**

Planned Giving

When you choose to give to United Way of Southwestern Pennsylvania through managing your assets or the assets of a loved one, your gift lives on and continues to make a lasting impact. This is an enduring legacy for your community that reflects your values and commitment to others. This option also provides the additional benefit of tax-free giving or tax reductions, which may result in a better financial return for your estate.



Name United Way of Southwestern Pennsylvania in Your Will

Designate an amount, an asset or percentage of assets.

- Provides a lasting legacy.
- Gives you the freedom to change your mind if your situation changes.

Name United Way of Southwestern Pennsylvania in Your Retirement Plan

Designate United Way of Southwestern Pennsylvania as a full or partial beneficiary to your retirement account.

- Avoid potential double taxation on retirement fund gifts to heirs (estate and income tax).
- Continue to draw money out of your retirement account while you are living.
- Gives you the freedom to change your mind if your situation changes.

Choose a tax-free rollover gift from an IRA

The rollover counts towards the donor's Required Minimum Distribution annually.

- People over 65 can give up to \$100,000 per year to charity tax free.
- Withdrawals from an IRA account must begin by age 70.5.

Both types of designations reduce the taxable estate.

Gift Of Cash or Stock

Provides an immediate tax break.

GIVING STOCK VS. CASH

	Gift in STOCK	Gift in CASH
Size of your gift:	\$200,000	\$200,000
Income tax savings*	\$79,200	\$79,200
Capital gains tax savings	\$30,000	None
Medicare surtax savings	\$5,700	None
Gift "cost" after tax savings	\$85,100	\$120,800

*assumes a 39.6% tax bracket

Name United Way of Southwestern Pennsylvania In Your Insurance Policy

- When United Way of Southwestern Pennsylvania is named as a beneficiary, you will receive a tax deduction for annual premiums.
- You pay the policy premiums, but a life insurance policy allows you to make larger gifts.
- United Way of Southwestern Pennsylvania can be named on a new or existing policy.

United Way Life™ is our own policy offered to donors. The chart below illustrates costs for various policy amounts for different ages (example only), actual premiums will vary.

United Way Life Sample Rates For \$250,000 Policy

Age	Type	5-year Annual Premium	After Tax Annual Cost of Gift to Donor
35	Survivorship	\$5,000	\$3,350
45	Survivorship	\$7,200	\$4,824
55	Survivorship	\$10,600	\$7,102

Talk to your family members, financial advisor, attorney and/or accountant about adding United Way to your estate plan.

GIVE. ADVOCATE. VOLUNTEER.
MAKE AN IMPACT.



United Way of
Southwestern Pennsylvania

United Way of Southwestern Pennsylvania
serves Allegheny, Butler, Westmoreland,
Fayette & Armstrong Counties.

Strength in Numbers



A commitment to making a larger impact.

The mergers which formed United Way of Southwestern Pennsylvania continue to create efficiencies and a more sustainable network for the entire region.

Strength in Numbers

United Way of Southwestern Pennsylvania has the honor and advantage of serving five distinct, vibrant counties—Allegheny, Butler, Westmoreland, Fayette and Armstrong. Together, our resources and knowledge have created a highly efficient network organization that has broad impact in every community across the area.



WHY UNITED WAY MATTERS

- Our pooled resources and knowledge improve our ability to solve the most pressing problems facing our region, while developing and maintaining strategies that work for each local community.
- Together we unite more leaders that become a more synergistic force for community problem-solving.
- We have a stronger voice to influence local, state and national policy issues.
- We've eliminated redundant back-office systems and processes—driving efficiencies and creating new human service investment opportunities.
- We've streamlined campaign coordination and communications making it easier for companies to support United Way across county lines.
- We provide a consistent, seamless experience for our individual donors who live in one county and work in another.
- During times of crisis, we are able to respond more quickly and effectively.



WHERE LOCAL DONATIONS GO

- As always, your dollars stay within the county you choose.
- Local leaders influence how to address local issues through local problem solving, fundraising and helping agency partners.

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Tocqueville Society Step-Up Plan



**A flexible way to achieve the
highest level of commitment.**

United Way provides a convenient way to structure donations, thus helping individuals more easily reach their philanthropic goals.

Tocqueville Society Step-Up Plan

For over a century, United Way has partnered with strong leaders from across the community. That tradition continues with Tocqueville Society, a philanthropic giving society based on a \$10,000 annual donation. Tocqueville members enjoy access to special events, unique leadership opportunities and customized volunteer activities.



Immediate Benefits of a Tocqueville Membership

United Way relies on Tocqueville members for guidance, leadership and service on United Way's board and committees. Joining now provides immediate opportunities to network and serve alongside other community leaders.

Choose Your Step-Up Plan

United Way offers a pathway to leadership-level giving over a five-year period. When you make a commitment to increase your annual United Way gift to \$10,000 over time, you will be recognized as a Tocqueville Society member from year one.

Plan	Year 1	Year 2	Year 3	Year 4	Year 5
Five-Year Plan	\$5,000	\$6,000	\$7,000	\$9,000	\$10,000

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Tocqueville Society Retirement Legacy Program



A commitment that lasts beyond retirement.

The Tocqueville Society Retirement Legacy Program provides an opportunity for retiring individuals to maintain an active role in improving our community.

Tocqueville Society Retirement Legacy Program

United Way is making it easier for you to stay active in the Tocqueville Society, even into your retirement. Thanks to a generous matching fund from a United Way donor, you continue your personal legacy as a champion of families, seniors, children and people with disabilities, today.



How the Tocqueville Society Retirement Legacy Program Works

Any current Tocqueville Society member who is in the process of retiring or has recently retired is eligible for the Retirement Legacy Program. These members may extend their status for a two-year period, with a commitment of giving \$5,000 per year.

How to Maintain Your Tocqueville Membership

- Pair a \$5,000 donation with a planned gift of \$50,000 or more (if a planned gift is not already established)
- Begin giving at the \$10,000 level again
- Use the 5-year Tocqueville Society step-up plan:
 - Year one: \$5,000
 - Year two: \$6,000
 - Year three: \$7,000
 - Year four: \$9,000
 - Year five: \$10,000

Don't let retirement change the things that matter most.

Stay involved in the important work of United Way. Your leadership makes a difference to thousands of people in our community every day. Let's keep the great work going together.

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Community Impact Report



A Commitment to Southwestern Pennsylvania.

Thanks to the commitment and generosity
of Southwestern Pennsylvanians, your United Way
is one of the strongest in the nation.

Community Impact Report

We thank you and all of our donors for the trust you place in us through your generous contributions of time and money. We will continue to invest donations strategically, efficiently and effectively to help create lasting change in people's lives and our community. We are proud of all that we have been able to accomplish. With your continued support, we can do so much more.



YOUR GIFTS CREATE CHANGE

- More than 71,000 people made donations to United Way in 2019-20.
- Gifts totaling \$38,489,214 in 2019-20.
- 508 Tocqueville Society members with gifts of \$10,000 or more.
- 500,000+ people served throughout the region.



CHANGEMAKERS IMPROVE OUR COMMUNITY

- More than 17,000 volunteers.
- Partnerships with strong agencies.
- More than 750 workplaces strong.



TOP-TIER RECOGNITION

- 4-star Rating by Charity Navigator nine years in a row.
- 3% of charities have received this rating for nine consecutive years.

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FOCUS AREA:

People With Disabilities



**United Way of Southwestern Pennsylvania
is committed to connecting people with disabilities
to opportunities for employment and social connection.**

United for People with Disabilities

United Way of Southwestern Pennsylvania invests in programs and initiatives that help people with disabilities achieve greater independence and social connection.

When you support United For People With Disabilities, your donation:

- **Helps people with disabilities** obtain and retain competitive employment.
- **Makes homes safer** and more accessible for people with disabilities.
- **Provides in-home support** so people with severe disabilities can avoid homelessness or institutionalization.
- **Connects Veterans** with disabilities to the benefits they have earned, as well as housing and employment.

United Way initiatives are making a difference.

- **21 and Able** is an initiative convened by United Way, which helps the transition to adulthood. This includes creating meaningful education and employment opportunities as well as promoting changes to public policy.
- **Disability Inclusion Consortium** is an employment initiative comprised of more than 40 employers who meet to discuss best practices, challenges and opportunities regarding hiring people with disabilities.

Together, we are making an impact.

- In the past year nearly 1,000 people with disabilities were hired by employers participating in the **Disability Inclusion Consortium**.
- Since its inception, 3,000 people with disabilities have gained employment through the **Career Transition Project**.
- In the last year, 137 people with disabilities were able to live independently due to support for safe and accessible housing.

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FOCUS AREA:

United for Seniors



**United Way of Southwestern Pennsylvania
is committed to improving the lives of older adults
and enriching the lives of all.**

United for Seniors

United Way of Southwestern Pennsylvania is leading innovative approaches to improving the lives of older adults by promoting their wellness, meeting basic needs and supporting family caregivers.

When you support United For Seniors, your donation helps:

- **Develop technologies** to identify seniors' health risks early, during weekly meal delivery or rides to appointments.
- **Provide educational and coaching services** for seniors including chronic disease self-management, medication management and injury prevention.
- **Fund home repairs and modifications** to make homes safer and more accessible for people to age in their homes.

United Way initiatives are making a difference.

- **Open Your Heart To A Senior** recruits and connects volunteers with seniors and family caregivers, providing in-home support including meal delivery, transportation and companionship.
- **United for Caregivers@Work** strategizes with companies to address the needs of employees caring for older loved ones.
- **PA 2-1-1 Southwest** provides a lifeline for seniors and family caregivers through a senior specialized resource navigator.

Together, we are making an impact.

- We helped **42,618 seniors** to meet basic needs and avoid hunger, homelessness and unsafe conditions.
- We supported **13,566 working caregivers** as they helped older loved ones age in place with dignity, while juggling caregiving responsibilities.
- Volunteers provided **15,900 rides** so that seniors could get to the grocery store, the doctors and more.
- 18 partner agencies mobilized more than **3,000 volunteers** to help more than 9,000 older adults through Open Your Heart to a Senior.

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FOCUS AREA:

Helping Financially Struggling Families



**United Way of Southwestern Pennsylvania
is a lifeline for families and individuals including veterans
and active military personnel.**

Helping Financially Struggling Families

United Way of Southwestern Pennsylvania works with community partners to enable individuals, families and veterans or active military and their families avoid poverty, overcome financial hardships, recover from crises and move closer to financial stability. We address the root causes of their struggles and convene partners to advocate on their behalf.

When you support United for Families, your donation helps hardworking, low-income families by:

- Providing access to food, shelter and clothing when in need.
- Ensuring access to heat, water and electricity.
- Improving employment opportunities and helping maintain financial stability.
- Providing physical and emotional care for women and their families who are victims of domestic violence.

United Way initiatives are making a difference.

- **Free Tax Preparation** helps low-income working families access the Earned Income Tax Credit.
- **United for Women** assists women facing a short-term financial hardship.
- The **Emergency Basic Needs Fund** helps individuals and families meet immediate financial crisis.
- **Mothers Making More** helps working single mothers in Westmoreland and Fayette counties go back to school, advance their careers and lay the groundwork for a brighter future.
- **PA 2-1-1 Southwest** is our community's 24/7 hotline for human services. We connect people via phone, text or web with resources to prevent homelessness, hunger and improve financial stability.

Together, we are making an impact.

- United Way's Free Tax Prep Coalition filed 10,680 tax returns, resulting in **\$15.4 million in refunds**, including \$6 million in Earned Income Tax Credits.
- We helped more than **71,000 people** avoid homelessness.
- We assisted more than **2,200 women** as they navigated unexpected crises.
- We connected more than **6,000 veterans** to resources providing transportation, food and employment.

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FOCUS AREA:

United for Children



**United Way of Southwestern Pennsylvania
mobilizes the caring power of our community to ensure
that all children reach their full potential.**

United for Children

United Way of Southwestern Pennsylvania is committed to promoting high-quality learning experiences for students of color and helping all children in our community grow, learn and develop skills that equip them to be successful adults.

When you support United For Children, you help fund programs that promote academic and social skills development by:

- **Helping ensure children start off strong** in school and are prepared for success.
- **Establishing sharing, positive relationships** with strong role models.
- **Encouraging attendance** through positive reinforcement.
- **Advocating for racial equity** and systemic change in schools and communities that support success of children of color.

United Way initiatives are making a difference.

- **Early Learning** nurtures children from birth through third grade and supports critical initiatives that strengthen cognitive, social and emotional development.
- **School Readiness** ensures on-time Kindergarten registration and programs that produce early readers.
- **Mentoring Programs** inspire children to form positive relationships with caring adults to help them succeed in life.
- **Coaching Boys Into Men** partners student athletes with coaches to help young men practice respect, develop healthy relationships and reduce incidents of sexual violence.
- **APOST** supports access to and development of quality after-school and summer programs.

Together, we are making an impact.

- We helped more than **2,800 youth** establish caring and healthy relationships.
- We distributed more than **70,000 books** to help nurture early learning among young children.
- We helped register more than **14,000 kindergarten students** on time to begin the first day of school.
- We provided **56,000 children** access to quality programs outside of school hours that helped strengthen academic and character-building skills.

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Learn more at uwsdpa.org



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