

Tocqueville Society News

FROM THE REGIONAL BOARD CHAIR

A Note from Mindy Holman

It has been a great honor to serve as your board chair. As I reflect on my experience, I am in awe of the dedication, hard work and passion shown by my fellow board members, our Campaign Cabinet, our many donors, volunteers and advocates and, especially, our Tocqueville Society. I am so grateful for your incredible support and leadership.

We are well on our way to meeting this year's campaign goal and, on behalf of all of us at United Way, thank you for your generosity.

In the next fiscal year, current vice-chair of our Board of Directors, Tocqueville Society member and my good friend Gordon Cooney of Morgan Lewis, will build on our past successes and lead the organization in another exciting chapter for our United Way. **As you may already know, the organization is refining its Impact agenda to focus on ending intergenerational poverty.** Over the past 18 months, the Impact Strategy Committee and United Way staff have examined the most pressing needs throughout our region and articulated where our United Way can make the biggest Impact through investment of our resources. Together, the staff and committee volunteers are delineating the two-generation strategies and tactics we will deploy to break the cycle of poverty that plagues so many of our families. Because of this work, I am confident that our United Way is well positioned to change lives and strengthen communities across our region.

Change is part of growth, and I am proud to have played a role in this special community of leaders committed to ensuring our United Way is the premier philanthropic partner and change agent in the region. Thank you for your support. I hope you will continue to stand with us as we move toward our 100th anniversary and, most importantly, a new era for our critical work in the community.

Sincerely,



Mindy Holman

MINDY HOLMAN

Chair, Holman Enterprises

Chair, United Way Regional Board of Directors

SAVE THE DATE

We hope to see you at our upcoming events!

Pennsylvania Statewide Tocqueville Society Reception

Thursday, May 25, 2017

6:00 PM-8:30 PM

United2Feed

(a volunteer food-packing event)

Thursday, June 1, 2017

8:30 AM-12:30 PM

Kind Society Reception

Thursday, June 8, 2017

5:30 PM-7:30 PM

United Way's 2017 Golf Outing

Monday, June 19, 2017

10:30 AM Registration

11:00 AM Lunch

12:00 PM Golf

5:00 PM Cocktail Reception

Backpack-A-Thon

(a volunteer backpack-stuffing event)

Thursday, August 10, 2017

Day of Caring

(a family-friendly volunteer event)

Saturday, October 14, 2017

Event details as of date of publication.

FOR EVENT UPDATES, VISIT:

UnitedForImpact.org/Tocqueville

TO REGISTER AND FOR MORE INFORMATION, PLEASE CONTACT US AT

TocquevilleSociety@uwgpsnj.org

or 215-665-2448.

The Tocqueville Society is named after 19th-century French diplomat Alexis de Tocqueville, who recognized, applauded and immortalized the distinct American voluntary spirit. Founded in 1984 by two of our own local leaders, Ambassador Walter Annenberg and John C. Haas, our regional Tocqueville Society is based on the premise that "Leaders Lead."



TOCQUEVILLE SOCIETY MEMBER SPOTLIGHT

Tom Trala

Chief Financial Officer, FS Investments

HOW DID YOU BECOME INVOLVED WITH UNITED WAY?

In 2000, I joined the Philadelphia office of Ernst & Young. It, like many employers, ran a workplace giving campaign which made it easy for me to participate and support the city and region where I worked and lived. I remember first listening to the United Way representative's presentation. I signed up for something like \$5 a paycheck and have participated every year since. I continue to support the workplace campaign strategy as a means to encourage people to start on their philanthropic journey; I think it is a wonderfully simple idea.

WHY HAVE YOU CHOSEN TO SUPPORT UNITED WAY'S WORK AT THE TOCQUEVILLE SOCIETY LEVEL AND ALSO TO PARTICIPATE AS A CAMPAIGN CABINET AND TOCQUEVILLE COUNCIL VOLUNTEER?

I view my Tocqueville Society contribution to the Impact Fund as an efficient way to help as many people as possible across the Philadelphia region fight against poverty and its ill effects. Like an investment manager selects the best investments and builds a portfolio for maximum impact, so does United Way in vetting and supporting worthy organizations; that makes good sense to me. I've volunteered on the Campaign Cabinet since 2014 and recently got involved with the Tocqueville Council because I'm passionate about the need to lift our region through smart philanthropy, and I enjoy being around those who feel the same way.

WHAT ARE YOUR INTERESTS AND PASSIONS RELATED TO YOUR SUPPORT OF UNITED WAY'S IMPACT FUND AND WHY?

I've seen firsthand how access to good education and healthy food options can begin to break through the barriers that poverty brings, so my philanthropic passions lie there. The absence of both of these core elements puts children, and their parents, continually at odds with society's demands. That said, poverty is not a one-dimensional problem, and United Way's Impact Fund recognizes that fact.

"My vision for our Tocqueville Society is to assure donors that United Way solves core issues associated with philanthropy: time, breadth and impact."

—TOM TRALA

IN WHAT WAYS (E.G., VOLUNTEERING AND ADVOCATING) DO YOU AND YOUR FAMILY ENGAGE IN THE COMMUNITY?

My family's engagement matches our passions in that we all volunteer at our local CSA, which provides fresh produce to its members as well as local food kitchens. My wife is a very active volunteer at our children's school, with a focus

on helping new and current parents become integrated into the school community so they can reap the highest benefit for their families. I previously served on the board of a Philadelphia charter school, and I'm in the process of finding a new avenue to share my experience that will benefit Philadelphia schools.

WHICH TOCQUEVILLE EVENT THAT YOU ATTENDED WAS YOUR FAVORITE AND WHY?

I have hosted a Tocqueville Society event at FS Investments but have not yet had the opportunity to attend any other events. It seems my calendar is always in conflict with the annual PHS Flower Show invitation, which I very much want to attend one of these days!

WHAT'S YOUR VISION FOR UWGPSNJ'S TOCQUEVILLE SOCIETY?

I believe that the Greater Philadelphia area is home to a large population of generous people of wealth who want to see the region thrive. Predictably, this group has its own set of philanthropic passions and, as such, charitable giving flows in many directions. My vision for our Tocqueville Society is to assure donors and would-be donors that United Way solves core issues associated with philanthropy: time, breadth and impact. Also, to communicate that investing in the Impact Fund is a simple and efficient way for donors to pool funds together and support a diversified portfolio of high-performing, well-vetted nonprofits that can collectively lift the region out of poverty. The Impact Fund's approach and the Tocqueville Society's scale can make a real difference if we can convince more people to choose this simple solution.



EVENT SPOTLIGHT

Philadelphia Flower Show Reception

Nearly 200 Tocqueville Society and Visionary Circle members met and networked on March 15 at the renowned Philadelphia Flower Show. Guests celebrated the generous support and leadership of our giving societies and later had the opportunity to enjoy the beautiful “Holland: Flowering the World” exhibits.

In his introductory remarks, United Way President and CEO Jim Cawley shared that our organization has been looking at the Impact our United Way needs to make in our next century.

Then, Gordon Cooney, chair of the Impact Strategy Committee and current vice-chair of our Board of Directors, shared details about the newly refined Impact agenda and commented on the benefit of aligning investments around a central cause.

As United Way approaches its 100th anniversary and rallies the community to end intergenerational poverty, Tocqueville Society members will be critical partners in bolstering success and leading this work.

Pictured above: Tocqueville Society members Stephen and Diana Kaye



EVENT SPOTLIGHT

Holiday Volunteer Outing with Cathedral Kitchen

In December, Tocqueville Society members and their family members gathered together to volunteer with Impact Partner Cathedral Kitchen in Camden. Volunteer responsibilities included setup, plating and serving meals to guests and cleanup. The volunteers also received a tour of the facility and learned more about how United Way's support of Cathedral Kitchen is critical to its success.

Nearly 39 percent of the city of Camden lives at or below the federal poverty level, and Cathedral Kitchen is the city's largest emergency food provider, serving more than 10,000 meals a year.

In addition, Cathedral Kitchen operates a job training program and offers job placement services, with many graduates going on to work at local companies. Sharif is one success story. Always a hard worker in his staff role at Cathedral Kitchen, Sharif graduated from the program and received a job offer to work in a management position in the food service division of Compass Group.

This important afternoon brought this work to life and helped the volunteers see the impact of the organization firsthand. Thank you to all of the volunteers! Check out our “Save the Date” section for more upcoming events and ways to see the impact of your investment.

Pictured above: Inspired United Way Tocqueville Society members, families and staff shared service at Cathedral Kitchen

MAKING A BIG IMPACT

Lubert IDA Program Supports Small Business Owners

In 2017, thanks to generous support from Tocqueville Society Member Ira Lubert, our United Way expanded its Lubert Individual Development Account (IDA) program to allow for small business development. This program has focused on helping participants save to further their education or purchase a home, with impressive results. To date, hundreds of graduates have saved more than \$737,000, which has been matched by nearly \$2.4 million. With the new small business expansion component, eligible individuals receive \$2 for every \$1 saved to purchase assets to expand their business, up to a total savings of \$6,000. Through financial education, entrepreneurial business training and approval of a business plan, more individuals can work toward their financial stability goals and reinvest in their community. Small business owners can then hire workers and boost their wages above the poverty line—promoting local economic development and helping to revitalize distressed communities.

Ira M. Lubert and IDA program participant Lavar Edwards



For an IDA program participant like Tyrone in Camden, the program gives him the tools and savings he needs to bring his business to the next level. Tyrone always had an interest in using his background in retail to start an online store. By enrolling in the program, he is able to launch his idea and use his matched earnings to create a website, design a business logo and stock up on inventory. Now, his business is growing, and he is proud of the investment he is making for his family's future.

As we focus on our goal to end intergenerational poverty, the evolution of the Lubert IDA program will support small business owners like Tyrone and continue to build on Ira Lubert's legacy of helping more individuals and families realize their dreams.

More than 600 individuals have graduated from the program, including:

more than 400 participants who have saved toward post-secondary education and nearly 200 participants who have purchased homes.

FROM THE PRESIDENT & CEO

A Note from Jim Cawley

During my time with United Way, it has been a privilege to see our Tocqueville Society grow stronger and more passionate about our work with each passing year. Because of your leadership, interest and support, we are able to offer exciting volunteer opportunities, eye-opening agency tours and robust conversations about important community needs and resources. Your generosity and commitment are inspiring, and on behalf of all of us at United Way, thank you for partnering with us to achieve what none of us can do alone.

An exciting new chapter for our organization is upon us, and our focus will be ending intergenerational poverty. Our region is home to the poorest big city in the country and some of the poorest communities in southern New Jersey, where poverty traps generations of families for decades. As we continue to refine our agenda and make plans for our 100th anniversary, we invite you to join us in this important movement. Together, we will create brighter futures for generations to come. Once again, thank you for your generous support in this life-changing work, and I hope to see you soon!



Jim Cawley

JIM CAWLEY
President & CEO, United Way
of Greater Philadelphia and
Southern New Jersey