

SPOTLIGHT

Dedicated to informing and connecting Tocqueville Society Members | Summer 2024



United Way of
Southwestern Pennsylvania

WELCOME

On the cover



Summer Campers at H.O.P.E. for Tomorrow, one of the 49 sites funded by United Way's Welcome Back Summer.

This summer is the fifth year that United Way is making a significant investment in summer programs. In 2024,

we will invest \$1 million in high-quality summer programs that serve low- to middle-income families. These programs are critical for families moving to financial stability. When school is out, families need affordable and enriching programs that keep kids safe and engaged while their adults are at work. United Way's funding provides a region-wide network of programs that connects summer programs to best practices. Kids who attend take part in activities they may not get in school, such as arts and culture and entrepreneur-focused programs, as well as new experiences and field trips that aren't available anywhere else. Last summer, Welcome Back Summer provided rewarding experiences for 9,016 children and youth. And, 507 camp counselors found meaningful summer employment.



The 2022-2023 Report to the Community is out!

If you haven't seen it yet, take a moment to check out our 2022-2023 annual report. You can download it on our website at bit.ly/3V8JGzH. The report focuses on how our request for proposal process benefited 110 agencies across all five counties. Watch for updates this fall.



2023-2024 Tocqueville Society Committee Members

Jayne Butcher, Blank Rome - *co-chair*
Steve Thompson, Schneider Downs - *co-chair*
William Blose, KPMG
Christopher Brennan, Reed Smith
Augustine Faucher, PNC
Anne Foulkes, PPG
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Kevin Miller, Northwestern Mutual
Daniel Potetz, Deloitte
Mary Richter
David Riehl, Baird
Thomas Ryan, K&L Gates
Brian Trudgen, Jones Day
Chaton Turner, UPMC
Kevin Walling
James Yard, Schneider Downs
Ray Zipay, PNC

IMPACT FEATURE

New ALICE data shows working families face increasing challenges

Late last year, the U.S. Census Bureau released its American Community Survey, which considers many factors, including regional poverty rates. The Post-Gazette reported that Pittsburgh's poverty rate of about 19% exceeds the national rate of 12.6%. But these numbers don't tell the full story. United Ways in 31 states use ALICE data—which stands for Asset Limited, Income Constrained, Employed—to track how working people are faring and why earnings do not cover their basic expenses. Newly released ALICE data shows that the cost of surviving has continued to climb and is more than three times the federal poverty rate.

ALICE reveals that families need to earn significantly more than poverty-level wages. The 2024 federal poverty level for a family of four is \$2,600 a month. But in Allegheny County, United Way's ALICE data indicates that this family actually needs \$8,054 a month to afford housing, child care, food, transportation, health care and basic technology. This is a significant increase from the previously published budget of \$6,202. In Westmoreland County, where living expenses are slightly lower, the ALICE budget for a family of four is \$7,366, up \$1,593.

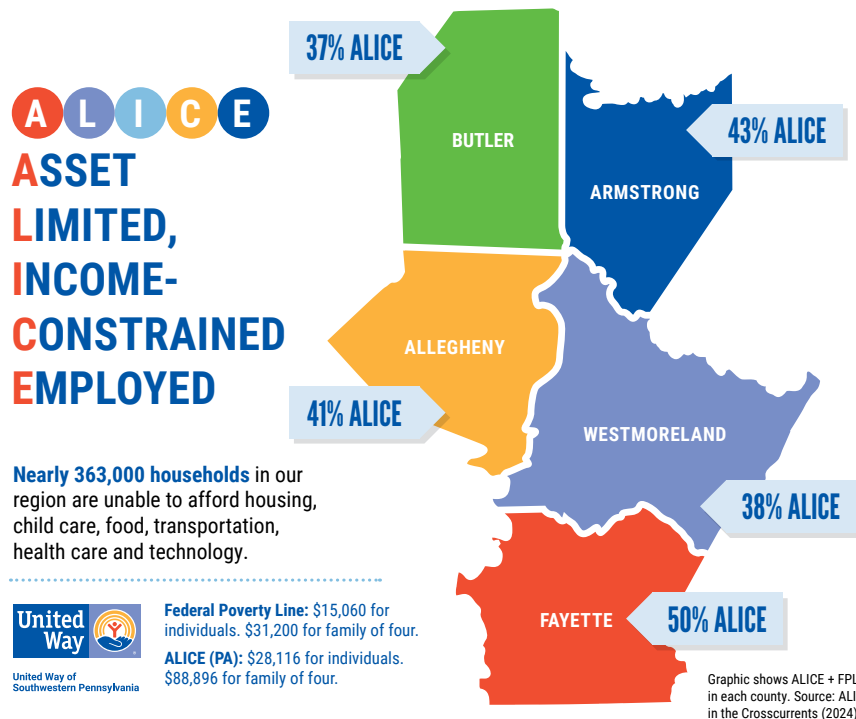
Just how many households meet ALICE and federal poverty level criteria locally? It's now 43% in Armstrong, 37% in Butler, 50% in Fayette and 38% in Westmoreland counties.

In Allegheny County, 12% of households live below the federal poverty line, but when ALICE households are added, the percentage more than triples: 41% of households live below the ALICE budget threshold.

So, what changed? United Way of Pennsylvania cites three factors. First is the increased cost of living due to inflation.

TOO MANY PEOPLE CANNOT AFFORD BASIC NEEDS.

42% of people regionally do not earn enough to cover the basics.



Second is significant reductions to pandemic assistance programs, including the expiration of the American Rescue Plan, which resulted in approximately \$15,000 less per family in tax credits and stimulus payments. Finally, wage growth did not keep pace with increasing costs and the loss of assistance programs.

The takeaway: significantly more people in our region are struggling to meet their basic needs than those counted by federal poverty guidelines. Our hope is that ALICE is a call to action for policy makers, business and community leaders, and our neighbors to understand the challenge of what a real safety net for working people would require, and the opportunity that awaits when everyone has what they need to thrive. 🌱

EVENTS THAT UNITE



Candid Conversations. Feb. 7, 2024. Dr. Marc Cordero, who serves many roles at UPMC, could have taken his skills as a surgeon and administrator anywhere in the world, but chose to stay and to practice in his hometown of McKeesport. He spoke of his deep commitment to community and public health. *Top row: Marc Cordero. Bottom row: Annmarie & Mike Lyons; Marc & Laura Cordero; Don Vigliotti & Kathy Silvaggi and Brian Trudgen; David Matthew and Marc Cordero.*



Celebrate to Elevate. April 10, 2024. More than 300 United Way donors and guests attended this annual fundraising event, which raised \$100,000 for the Impact Fund. A new name for Women's Leadership Council, Women United, was unveiled, and the event focused on how United Way's Impact Fund benefits women and children. *Top row: Women United co-chairs Maris Dauer and Kathy Humphrey; Jen Haefeli & JJ Matthews. Middle Row: Kathy Silvaggi & Don Vigliotti; Neil DiBiase, Linda Jones and Bobbi Watt Geer. Bottom Row: Keri Brown and Maris Dauer.*



Advancing the Impact. May 9, 2024. Tocqueville Society and Million Dollar Roundtable members gathered to celebrate United Way's investments in building a better future for everyone in our community. *First row:* Tocqueville co-chairs Jayme Butcher and Steve Thompson; Anthony & Natasha Williams; Amy Crawford-Faucher, Jennifer Haggerty and Gus Faucher; Ann & Dmitri Shiry and Colette Steen. *Second row:* Jeff & Andrea Owoc; Rich Soeder and Grant Fleming; Brad Parrish, Joe Butcher and Wendy Parrish; Charlie Ferrara and Tom Grealish. *Third row:* Karen & Pierce Richardson; Laura Miller and Maris Dauer; Ed & Amy Haller; Rich & Sue Kelly and Barb & Rich Soeder. *Fourth row:* Mary Jo & Dan Haffner; Steve Thompson, Christine Bryant, Hoddy Hanna, Dottie Alke and Bobbi Watt Geer; Neil & Emily Orbin and David & Ashleigh Riehl. *Bottom row:* Susie & Tim Williams; Autumn & Matt Reitler; Wendy & Brad Parrish and Ben & Lori Stas.

CEO PERSPECTIVE

Pa 211 Southwest: A lifeline for our neighbors in need.

By Bobbi Watt Geer



Raymond is a veteran and a senior citizen. He's also legally blind. About once a week a neighbor stops by to read him his mail. They are stunned to learn that one of the unopened letters is a shut-off notice

from the electric company. Kenneth was evicted from his home a month ago. He is homeless for the first time and has no idea what to do. Andrea was recently hospitalized for a hip replacement. Her husband won't let her move back home after the surgery, so she's been living in her car in the hospital parking lot for three weeks.

Each of their situations is unique, but thankfully they are not alone. Raymond, Kenneth and Andrea* are among 1.3 million people who reached out to PA 211 last year. The PA 211 call center network spanning the commonwealth provides a safety net that anyone in Pennsylvania can turn to for assistance. Requests come in by phone, text, chat or through the [PA211.org](https://www.pa211.org) website. Contacts are answered by a trained Resource Navigator, a real person who has a database of 80,000 human services resources at their fingertips. The service is free and confidential.

Regionally, PA 211 Southwest, which launched in 2011 and is operated by United Way of Southwestern Pennsylvania, now serves Allegheny, Armstrong, Beaver, Butler, Cambria, Fayette, Greene, Indiana, Lawrence, Mercer, Somerset, Washington and Westmoreland counties.

Every contact starts with a human connection. The Resource Navigator asks each caller their name, where they live and how they can help. Often, a call about not having enough money for rent turns into a much larger conversation. Does the caller have enough to eat? Are they able to pay their utility bills? How is their health, and do they need referrals to clinics in

their community? More recently, in recognition that internet access has become a necessity for everything ranging from school to work to telehealth, Resource Navigators ask if callers need help accessing low-cost internet, computers or other devices, and basic technical assistance to get and stay online.

Resource Navigators provide contact information for nonprofit, government and faith-based resources in the caller's neighborhood. A few days later, the Resource Navigator may reach back out to ask if the caller has been able to connect with someone, get the help needed and learn if there are additional resources they can provide.

The PA 211 network is a safety net and a safety blanket for people who are exhausted and overwhelmed by their circumstances.

Running the network is expensive. Regionally, PA 211 Southwest costs \$5.2 million annually, including technology, office space, training, equipment and compensation for Resource Navigators.

Who pays for PA 211? Pennsylvania allocates \$750,000 annually, which is spread across the network of four PA 211 call centers in the commonwealth. Regional government contracts contribute about \$1 million annually for 211 Southwest PA. A one-time \$4 million investment in PA 211 from the commonwealth in the 2022-23 budget was both needed and appreciated, and those funds have been used to make a variety of infrastructural changes to address past capacity needs and enhance technology.

The remaining costs are covered by regional United Ways like ours because we believe in 211. It's a bargain: Rental assistance that keeps a family safely housed is an investment in staving off far more expensive physical and mental health issues. Services that allow older adults to remain in their homes keep their social networks intact and cost far less than assisted living.

Just as valuable as the assistance that people like Raymond, Kenneth and Andrea find through 211 is the human connection Resource Navigators provide. Their empathy and expertise are available around the clock in whatever form—phone, text or chat—works best for the caller. Language is never a barrier: translation assistance is available in more than 170 languages. ♣

DONOR FEATURE

Values alignment:

How Tocqueville Society supports personal philanthropic missions



Kevin Miller, managing partner at Northwestern Mutual, has been a Tocqueville Society member since 2002. Kevin met **Matt Reitler** in 2020, when Matt was a Slippery Rock University student interning

with the company. Northwestern Mutual has a culture of mentorship and philanthropy, and Kevin immediately recognized Matt as a kindred soul. Matt is now a financial advisor with the firm. Both were taught by their parents to give back and are as committed to philanthropy as they are to their work. Kevin referred Matt to United Way's Tocqueville Society in 2023 and he is now one of the Society's youngest members. We talked with Kevin and Matt about their giving and their values. Here are highlights of that conversation.

Kevin, what were your first impressions of Matt? Matt interned with us his senior year. It was evident right away that that he was going to do big things. He comes from a strong foundation from both his father and his mother's legacy.

Matt, how did you land at Northwestern Mutual? I connected with the company initially at a career fair and then did a lot of research around values alignment. My personal mission is to honor God and continue my mother's legacy of kindness. My mom passed unexpectedly when I was 12. She was remarkably kind and compassionate. She worked in the financial services industry for most of her life. I saw the impact she made personally and professionally through her sincere approach to relationship building. This career allows me to continue her legacy by helping others plan for the future and sow into things that are important to them.

Kevin, you have a family history with United Way, correct? Without question, anything I have done philanthropically is rooted in how I was raised by my mother and father. Both of them were very philanthropic and involved in our parish and several charities. My connection to United Way goes back almost 50 years, when my father was the workplace campaign manager for ALCOSAN. It was impressed upon my brother and me to give back and put dollars aside on a regular basis for people who need help.

I also got my start with Northwestern Mutual as an intern back in the 1990s. I saw Northwestern Mutual getting involved with United Way campaigns. I started contributing more as my career progressed. By the late 90s I was involved in United Way's young



leadership board. When I moved to Northwestern Mutual's headquarters in Milwaukee, I was already a Tocqueville Society Member and was asked by United Way there to coach their Development team to ask local business owners to get involved. I returned to Pittsburgh in 2007 and have been working to grow our campaign ever since.

What made you think of inviting Matt to join the Tocqueville Society? Every year we review a list of our new advisors to identify those we think will benefit and step up at a higher level with our United Way campaign. Matt was on the top of that list because of who he is and what he values.

Kevin, can you say more about how Tocqueville Society membership relates to your workplace goals? It's definitely a values consideration. Our mission at Northwestern Mutual is to guide, impact and transform the communities we serve. The work that United Way does is at the forefront of this because they understand the needs of our communities. That critical vetting makes the partnership and alliance all that much more worthwhile.

Matt, how does being a Tocqueville Society member align with your personal mission? United Way allows me to strategically express generosity and diversify my impact. I believe that life, nature and time will destroy all material things, but my legacy will live on through the places I invest my time, talent and treasure. United Way gives me an avenue to do all of that.

What's that like for you to be among our youngest Tocqueville Society members? Age is such a funny thing to me. Our culture places so much emphasis on what people are allowed and not allowed to do based on age. We even subconsciously limit our own potential sometimes based off of our age. I don't ever let anyone look down on me because I am young. Therefore, it is exciting to think that I am a part of leading the charge for my generation to think deeper about long-term legacy and maximizing our impact.

I have 24 hours in my day like everyone else. To reach more people and touch more lives, we need to team up. I am an advocate for United Way because I appreciate its mission and infrastructure. They offer convenient and unique avenues for my wife and I to express generosity and devotion to the things that are important to us. 🌱

TOCQUEVILLE SOCIETY

Candid Conversations

September 2024 | Details coming soon!

Join your fellow Tocqueville Society members for the next Candid Conversations and learn more about these members and their pathway to philanthropy.

VOLUNTEER ENGAGEMENT

211 Experience

Tuesday, June 18 | 9:30 to 11 a.m. or 3:30 to 5 p.m.

Tuesday, July 16, 2024 | 9 to 10:30 a.m.

Location: United Way – Pittsburgh Office

Get an inside look at the work of our 211 team, learn about the significant needs of our neighbors and the resources made available to those who contact 211.

Register at uwsdpa.org/be-a-volunteer

VOLUNTEER ENGAGEMENT

Tools for Schools

August 2024 | Details coming soon!

Volunteers will pack 10,000 school supply kits that will be distributed to children in all five counties.

VOLUNTEER ENGAGEMENT

Week of Caring

Sept. 9 –13, 2024 | Details coming soon!

Engage in hands-on volunteer opportunities across the region. You will spread awareness of how United Way supports agencies while helping agencies complete needed projects and raising awareness of United Way across our five counties.

UPCOMING EVENTS

LEAVING A LEGACY

Whether you are managing a loved one's estate, or assets of your own, nothing is more satisfying than leaving a legacy to your community to impact people's lives. When you make a planned gift to United Way, you will support meaningful work while also benefiting from tax-free giving or tax reductions that provide a better financial outcome for your estate. Contact Linda Jones at **412-456-6768** or linda.jones@unitedwaysdpa.org for more information.



More great Tocqueville conversation continues online. Connect with the Tocqueville Society LinkedIn group to be a part of it at linkedin.com/groups/7461160.