

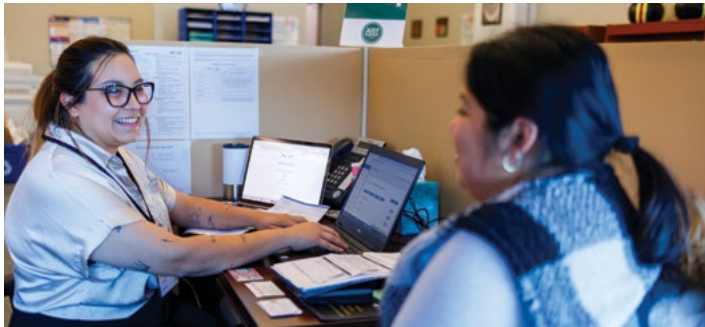
SPOTLIGHT

Dedicated to informing and connecting Tocqueville Society Members | Spring 2025



WELCOME

On the cover



A volunteer tax preparer assists a taxpayer at the Just Harvest Free Tax Prep site on Pittsburgh's Southside.

You can learn our more about our Free Tax Prep program in the story on page 6. If you know someone who makes less than \$65,000 and would benefit from this program, ask them to call 211 or text 898-211 to schedule an appointment.

Image by Maranie Staab for United Way, 2025.

New website

In December, we launched our new website at [UnitedWaySWPA.org](https://www.UnitedWaySWPA.org). Our goal: help people learn what we do and feel inspired to donate, volunteer and collaborate with us. Check it out!



2024-2025 Tocqueville Society Committee Members

Darrell Smalley, EY, *co-chair*

James D. Newell, Buchanan
Ingersoll & Rooney PC, *co-chair*

William Blose, KPMG

Christopher Brennan, Reed Smith

Jayne Butcher, Blank Rome

Marc Cordero, UPMC

Augustine Faucher, PNC

Anne Foulkes, PPG

Kate Gionta, KPMG

Jennifer Haggerty, Merrill Lynch
Private Wealth Management

Kevin Miller, Northwestern Mutual

Joseph Parsons, Jones Day

Mary Richter, Mosaic Soup

David Riehl, Baird

Thomas Ryan, K&L Gates

Brian Trudgen, Jones Day

James Yard, Schneider Downs

Ray Zipay, PNC

What's your why?



We asked Tocqueville Society and Impact Cabinet member Sylvia Diez which of our investment priorities most aligns with her values. Here's how she responded.

"As I reflect on the pillars of our work — meeting basic needs, moving to financial stability and building for success in school and life — I feel a deep alignment with meeting basic needs. This pillar resonates with me because it addresses the fundamental requirements for survival and dignity, such as access to food, shelter and health care.

I am passionate about ensuring that every individual in our community has their basic needs met, as this is the foundation upon which all our efforts and progress are built. When our community struggles to meet essential needs, it becomes incredibly challenging for people to focus on education, employment or personal growth. By providing support in this area, we create a stable environment that allows individuals and families to thrive."

IMPACT FEATURE

United Way doubles the impact of every dollar, study finds.



A pioneering economic impact study released in November by United Way of Southwestern Pennsylvania in collaboration with PwC concludes that **United Way, directly and indirectly, contributed \$65.4 million to**

the regional economy in fiscal year 2023. Beyond the 1.35 million individuals, families and children United Way served through its grants, programs and services in 2023-2024, the study quantifies how United Way also benefits the broader community throughout southwestern Pennsylvania.

While such economic contribution studies are routinely conducted in the for-profit sector, this effort was the first significant application of this well-established methodology and technology to the performance of a nonprofit human services organization. The study found a measurable return-on-investment for every dollar contributed.

“United Way has a long history of tracking outcomes and using data to make decisions. We knew anecdotally that our impact extends beyond the investments we make in human services,” explains President and CEO Bobbi Watt Geer, Ph.D. “This study provides a concrete and specific way to quantify how United Way benefits the wider community and drives the regional economy.”

PwC was engaged to explore United Way’s economic contribution to GDP in four distinct ways: **directly**, through the employment of more than 100 full-time employees; **indirectly**, via its operating expenses across the organization’s regional supply chain; **through stimulation** of greater consumer spending; and by **enabling** increased economic contribution by individuals through United Way grants and the Free Tax Prep Coalition, which returned more than \$11 million in refunds directly to individual taxpayers in 2023.

“This study represents a new way of thinking about human services philanthropy. It shows that organizations like United Way are not only funding critical human services that help those who use those services to thrive,” says United Way board chair and Tocqueville Society member Stacy Juchno. “We’re also a significant contributor to the regional economy.”

The study revealed how the effects of United Way’s operations, charitable investments and free tax preparation service added up to **581 regional jobs, \$34.7 million in labor income and \$65.4 million gross domestic product (GDP)** to the five-county regional economy. **Every dollar invested by United Way essentially doubled, generating at least two dollars of positive economic value.**

As an investment, United Way shows consistent multiplied returns in the form of jobs creation and distinct financial contributions to the local economy. For each job directly provided by United Way, an average of 4.4 additional jobs are supported across the five-county region (a multiplier of 5.4). For every dollar United Way pays its employees, \$3.60 of labor income is supported elsewhere in the local economy (a multiplier of 4.6). For every dollar of GDP directly generated by United Way, an additional \$1.70 of GDP is generated elsewhere in the local economy (a multiplier of 2.7).

New PwC study finds that United Way catalyzes economic impact and well-being.

Raymond Buehler, who serves on the United Way board and is a Tocqueville Society member, summarizes, “This economic impact study changes the conversation about the case for donating. It shows that a donation to United Way has a blue-chip return-on-investment that benefits everyone in the region, not just those who receive our services. It’s a ‘win-win’ for everyone in our communities.”

What the study did not include — As impressive as the findings are, the report does not reflect the additional impact that is difficult to quantify, such as impact associated with United Way’s grantmaking and designations. Nor does it factor in the vast number of lives that have been improved through the 211 contact center. The contribution of these offerings only adds to the impact revealed in the PwC study.

Read the study and an executive summary in the Knowledge Center on our website at [UnitedWaySWPA.org/resources](https://www.unitedwayswpa.org/resources). 📄

EVENTS THAT UNITE



Candid Conversation: Sept. 30, 2024. Senior vice president and chief economist at PNC and Tocqueville Society member Gus Faucher shared insights on the local and national economy and information about how these trends may impact philanthropic giving.

Row One (left to right): Bobbi Watt Geer, Amy Crawford Faucher & Gus Faucher; Susie & Tim Williams; Joe Kunze & Jennifer Haggerty. **Row Two:** Elaine & John Frombach; Wendy & Brad Parrish; David Cohen and Eric OKunewick. **Row Three:** Kathy Silvaggi, Jim Newell, and Don Vigliotti; Ann & Dmitri Shiry; Linda Jones and David Heaton.



United Way goes mobile

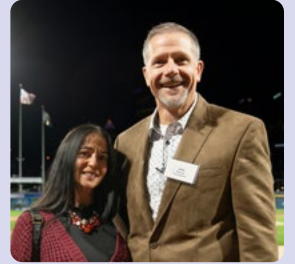
With UW4Me, our mobile engagement platform, all your events and activities are customized just for you and available at your fingertips! It's the fastest, easiest and most efficient way to view and sign up for events, track volunteer hours and giving history, donate and more on your mobile device.



IMPACT Awards: Nov. 13, 2024.

Tocqueville Society members gathered to celebrate the winners of this year's IMPACT Awards for outstanding volunteer service — Donnie Black of Allegheny Youth Development and Mary Ann Shiring of South Hills Interfaith Movement.

Row One (left to right): Award winner Donnie Black and guests from Allegheny Youth Development. **Row Two:** Justin Kaufman; Mark & Carole Shepard; Carrie & John Perrock. **Row Three:** Award winner Mary Ann Shiring with guests and board members Ray Betler and Linda Jones; Aaron and Jill Tilloston, Mark Shepard and Craig Tilloston. **Row Four:** Laura & Marc Cordero; Rich & Barbara Soeder with Ed Haller; David Riehl, Craig, Aaron and Jill Tillotson. **Row Five:** RJ Gallo, Brad & Wendy Parrish; Jim Newell, Bob Nutting, Darrell Smalley.



CEO PERSPECTIVE

Free Tax Prep: United Way gets millions of dollars back to hardworking families

By Bobbi Watt Geer, Ph.D.



Death and taxes, the saying goes. But what if tax season wasn't just a pain or a punchline and instead was the most stressful time of the year? For 41% of households in our region living at or below the ALICE threshold (asset limited, income constrained and employed), filing taxes

is an expensive and arduous process. People who are working hard but still not earning enough to meet their basic needs often have multiple jobs and a stack of W-2s, and tax prep fees are an additional burden.

Enter United Way's Free Tax Prep Coalition, which completes thousands of tax returns each year in our region for people making under \$65,000. Last year alone, the Free Tax Prep Coalition, co-led by Just Harvest, prepared nearly 9,000 returns, generated nearly \$12 million in refunds and saved taxpayers an additional \$2.4 million in tax prep fees. It's an extraordinary feat and, some might say, United Way's best kept secret. Through advocacy and outreach, we're hoping to change that so we can return more money to the hardworking community members who can use it to build better lives for themselves and their families.

Nationally, lower-income families pay about \$2.7 billion in tax prep fees and instant refund services every year. About 20% of people who are eligible for the Earned Income Tax Credit don't realize they can claim it. To have their taxes prepared for free by a compassionate and knowledgeable volunteer isn't just a relief, it is life changing.

Highly trained volunteer preparers know how to maximize refunds through the Earned Income Tax Credit and Child Tax Credits, which can total 50% of a household's

yearly income, with credits for up to \$2,000 per child up to a maximum of \$6,000. That \$6,000 goes a long way, especially for someone who only makes \$15,000 a year. Each return prepared at one of our 23 Free Tax Prep sites also saves about \$300 in tax prep fees per return.

It's money for an overdue car repair, books for school, a new computer or even a security deposit on an apartment. It's not just an investment in those individuals and their families but in the entire community: money back in the pockets of these community members is money that goes back into the local economy. Of those served, 20% have a household member with a disability, half have adjusted gross incomes under \$20,000 and the majority work multiple jobs.

Since United Way joined the coalition in 2009, we've recruited hundreds of volunteers every year who've prepared more than 120,000 returns, generating \$199 million in refunds and saving taxpayers nearly \$27 million in tax prep fees. This year we predict we'll surpass \$200 million in refunds and reach nearly \$30 million in tax prep fees saved. It's an accomplishment in which everyone connected to United Way — staff, community partners and our donors — can take enormous pride: our hard work and shared commitment make it possible

United Way applies for grants including an IRS grant, to fund the program, runs a request for proposal process to select our partners and oversees volunteer and taxpayer recruitment and visibility. Coalition partner Just Harvest manages staff and volunteer training and provides technical assistance, while all coalition partners help recruit volunteers and taxpayers.

There are now 13 coalition partners, including United Way, across Allegheny, Fayette, Westmoreland, Washington and Greene counties. Last year our sites assisted people across 318 zip codes and in 22 languages.

When you support United Way, you help lower income working families move to financial stability and build wealth. You enable a program that rewards them for their hard work while building financial literacy and investing directly in your community. 📍

DONOR FEATURE

For the love of Pittsburgh: Kate and Alex Gionta.

Tocqueville donors Kate and Alex Gionta met in 2005. She was from Ebensburg, a small Pennsylvania town, and he was from nearby Murrysville. They met at their first job at KPMG and fell for each other and the City of Pittsburgh. Married in 2012, the Giontas have lived downtown for over a decade. Kate also serves on the Tocqueville Society committee. We asked them about their commitment to United Way. Here are highlights from that conversation.

Kate, you're now managing director at KPMG. Take us back to the beginning when you and Alex first met.

Kate: At public accounting firms, a lot of young people start together at the same time. You don't know anyone else, so you work and hang out a lot together. Growing up in a small town, I would get butterflies in my stomach driving out of the tunnel and seeing the city on the other side. Pittsburgh can be hard to break into, but Alex is from here and knew the places to go.

Alex: We met within a month of starting at KPMG. I was going to take a job in Baltimore but then a position opened, and I took that job instead of moving. We became really good friends and the rest is history.

Charitable giving often starts with a personal story. What's yours?

Kate: My dad has been a volunteer firefighter in my hometown since 1968 and was an officer for more than 25 years. He's 75 now and still goes out on fire calls, driving the truck. I was even a volunteer firefighter for a brief moment. My mom was always involved in our church, which in a small town is the center of the community.

Alex: For me, living downtown for 12 years has spurred me to get more involved. We've watched it change from when we first lived here, when there were more people downtown, then no one during the pandemic. It's more balanced now. There are so many different people downtown all the time.

How did you connect to United Way?

Kate: I became involved in Women United several years ago through KPMG. Living downtown, you see that people need specific services. Learning more about United Way made me want to be involved. Also, it's our civic duty to contribute.

Alex: Every job I've had, the company has been involved with United Way through workplace campaigns and volunteering. At Covestro, where I'm a senior tax accounting specialist, it's an important part of our culture, and we want to get as many people involved as possible.

Tell us about your involvement in reviewing requests for funding.

Kate: We both helped review applications for funding and it was phenomenal. There are so many smart minds in the community who develop these organizations and do really meaningful work. Reading those applications, I appreciated the breadth of what United Way supports. As an auditor, it was important to me to see the level of diligence that goes into funding decisions.

Do you have a favorite United Way memory?

Kate: I really like Big Book Drop at Acrisure Stadium. During the pandemic, we were so happy to be out and doing something and I loved the scale of it. It was so much fun to be out with other people.

Alex: Definitely the grant review. It's a lot of work, but you learn a lot, which I think is so important. I feel much clearer about the needs of the community and how we can help. 🙌



Image courtesy of Kate and Alex Gionta.

— UNITED WAY — TOCQUEVILLE SOCIETY

ALL LEADERSHIP DONORS

Candid Conversation

Wednesday, March 12 | 5:30 to 7:30 p.m.

Location: Carlow University's Gailliot Center

Tocqueville Society member and Women United Co-Chair Dr. Kathy Humphrey is president & CEO of Carlow University. She'll speak about what motivates her commitment to service and philanthropy, and the personal journey that led her to become the leader she is today.

WOMEN UNITED

March Mixer & Shopping Crawl

Thursday, March 20 | 5 to 7:30 p.m.

Join us in the Zelenople business district in Butler County as we learn about Women United's support for our mission while networking and shopping at locally owned — many women-owned — businesses.

WOMEN UNITED

Celebrate to Elevate

Thursday, April 24 | Doors: 5 p.m. Event: 5:45 to 8 p.m.

Location: PNC Firstside Center

Join us for an evening for reconnecting with friends, making new connections and finding inspiration in the good that women can accomplish together. Learn about our mission through activities that illuminate the needs of women and children and how United Way is there to help. Enter to win prizes and raffles throughout the night and enjoy delicious food and drinks.

VOLUNTEER ENGAGEMENT

Big Book Drop

April 14 to 16 | Details coming soon!

Volunteers will sort and pack nearly 35,000 books that will be distributed to school and agency partners in Allegheny, Armstrong, Butler, Fayette and Westmoreland counties with the goal of helping kids build their home libraries.

VOLUNTEER ENGAGEMENT

211 Experience

Wednesday, April 23 | 9 to 10:30 a.m.

Location: United Way – Pittsburgh office

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

Register at unitedwayswpa.org/volunteer.

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@unitedwayswpa.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.