SPOTLIGHT

Dedicated to informing and connecting Tocqueville Society Members | Summer 2026

UNITED WAY of Southwestern Pennsylvania

WELCOME

On the cover

Kids who enter school ready to read and ready to learn are far more likely to read at grade level by third grade, graduate high school on time and ready to pursue their dreams. United Way's annual Big Book Drop volunteer event, held this year May 12 to 14 at Acrisure Stadium, supports this goal. Volunteers packed 38,000 high quality books for distribution by 100 partner agencies who put books in the hands of kids they serve. Since its inception, Big Book Drop has distributed an amazing 250,000 books across the region, fostering a love of reading and supporting literacy. We are grateful to our volunteers and our sponsors, CentiMark Foundation, Grant Thornton, Highmark and KPMG. See more photos on page 4.

Image by Joe Appel for United Way, 2026.

2025-2026 Tocqueville Society Committee Members

Amy Crawford-Faucher, Allegheny Health Network, *co-chair*

Augustine "Gus" Faucher, PNC, *co-chair*

William Blose, KPMG

Chris Brennan, Reed Smith

Marc Cordero, UPMC

Ronda Edkins, FNB

Derek Eichelberger, Schneider Downs

Kate Gionta, KPMG

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Jim Newell, Buchanan, Ingersoll & Rooney

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Mary Richter, Mosiac Soup

David Riehl, Baird

Darrell Smalley, EY

Laura Strobel, PwC

Chris Thel, K&L Gates

Ray Zipay, PNC Financial Services Group, Inc

Maximizing tax refunds for working households

Preliminary data shows that United Way's Free Tax Prep coalition volunteers prepared an amazing 8,726 returns, an increase of 213 more returns than last year, despite winter storms that caused some sites to close temporarily. Taxpayers also completed returns at local libraries with expert assistance from our volunteers. Even more filed tax returns on their own for free through United Way's **MyFreeTaxes.com** website. Final refund and return numbers will be available later this summer.

But what really tells the story is the impact the program has for taxpayers like Debra, an older adult, who had her taxes done for free at the Tarentum site. Debra's sister had always done their taxes, but when she passed away suddenly last year, Debra had no idea what to do. Her Free Tax Prep volunteer preparer identified a $6,000 deduction for 65+ taxpayers and a union dues deduction. Instead of paying $300 in tax prep fees, Debra received federal, state and local refunds and is now interested in volunteering as a Tax Prep site greeter next year.

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IMPACT FEATURE

United Way volunteers: what they get when they give

By Emma Martin, Media Relations and Storytelling Associate

Every Saturday from mid January to April 15 this year, Joe Sterf wasn't just running errands, relaxing at home or spending time with friends. He was dedicating his time to helping families, single parents, older adults and college students complete their taxes for free.

Joe, 37, is a United Way donor and one of 380 volunteer tax preparers who this year helped us complete nearly 9,000 tax returns for free for households with annual incomes under $70,000. It's the largest Free Tax Prep team United Way has mobilized since 2016.

United Way has also had record numbers of volunteers step up to help our staff evaluate Multi-Year Grant proposals submitted by regional nonprofits. Like Free Tax Prep, it's a commitment that takes concentration, care and a great deal of time. This year, we had so many volunteer evaluators, 180 in all, sign up to help that we halted recruitment early.

It's part of a trend we see at United Way: People from all sectors of the community are stepping up to help their neighbors and choosing engagement over apathy.

Among the proposal review volunteers was Tocqueville donor Dr. Marc Cordero, who has no shortage of time commitments: his many professional roles include vice chairing the Department of Surgery at UPMC East and teaching surgery at Pitt's School of Medicine.

Volunteers like Joe and Marc, who make time to pitch in, illustrate the value and meaning that results from volunteering.

For Marc, seeing the "nuts and bolts" of how local nonprofits work and the variety of services provided – from addressing food insecurity to providing supportive services for older adults – shows not only the range of needs but also the resourcefulness local nonprofits demonstrate in meeting those needs.

"Some of these organizations have been doing this for 35 years. You see the difference they're making and you wonder what else they could do with even more resources," Cordero said.

Reviewing proposals also confirmed why giving to United Way without restrictions on which agencies or causes matter is so critically important.

"Working for UPMC, obviously we're a pretty big group that touches a lot of lives, but you read these applications and you realize the impact that United Way has on just so many different walks of life. The needs and gaps in service they fill that aren't otherwise being addressed by government and corporate America."

For Joe, who works as a CPA at the PJ Dick, Trumbull and Lindy Group, giving back is a value his parents instilled in him from a young age. "If you have the means and the opportunity to help somebody, why not do it?" he asks.

The return on investment is profound: on average, Free Tax volunteers like Joe complete three to five tax returns per shift. For many low-income workers, their tax refund can total half their household's annual income, especially when volunteers help earners claim Earned Income Tax and Child Tax credits.

With so many people in our region working yet still unable to afford basic needs, volunteering offers tangible, hands-on ways to aid neighbors who really need assistance.

"It adds up, and you're able to see your impact one-on-one with people" Joe says. For volunteers like Joe and Marc, that's a return on investment they can't get anywhere else.

Image courtesy of Laura and Marc Cordero.

EVENTS THAT UNITE

Celebrate to Elevate at PNC Firstside Center: April 29, 2026

Our largest and only annual fundraising event, Celebrate to Elevate's 350 attendees raised $62,000 for United Way's mission. The evening included engagement activities about the needs of working Pennsylvanians, period kit packing, a silent auction and raffle baskets courtesy of donors and local businesses.

Row one (left to right): Debbie Graver; Susan Deakin and Amy Crawford Faucher. **Row two:** Chaton Turner and Denise Smalley; Mary Lou Gegick and Dottie Alke.

Advancing the Impact: June 4, 2026

What a great night at the ballpark! Nearly 150 Leadership Donors gathered at PNC Park's Homeplate Club and heard how our agency and funding partners are collaborating in new and innovative ways to address urgent needs in our community. Our guests also spent time in the Pirates dugout and on the field.

Row one (left to right): Wendy & Brad Parrish; Gus and Antoinette Faucher; Jake & Angela Nicolella with Eugene, Cynthia and Caroline DeFrank. **Row two:** Alex & Kate Gionta with Jamie Frischolz; Fehmida Mesania & Casey Brennan.

United is the Way Leadership Breakfast: March 19, 2026

Nearly 100 United Way leadership donors gathered at Giant Eagle's corporate headquarters to hear how United Way improves quality of life in Butler County. Bobbi Watt Geer kicked off the event, with panelists Tina Morasczyk, who is Women United co-chair; United Way board member and Butler/Armstrong representative Dr. Don Vigliotti; Community Impact team member Jesse Sprajcar; and YWCA Butler Executive Director Elizabeth Short.

Row one (left to right): Elizabeth Short, Jesse Sprajcar, Tina Morasczyk, Don Vigliotti, Bobbi Watt Geer. **Row two:** Kathy Selvaggi & Don Vigliotti; Linda Jones, Keri Brown, Bobbi Watt Geer, Tina Morasczyk.

Big Book Drop: May 12 to 14, 2026

Early literacy is the foundation of United Way's Building for Success in School and Life investment priority. Volunteers strengthened that foundation by packing an amazing 38,000 children's books for readers pre-K through high school. Books were distributed to 100 agencies across our region.

Row one (left to right): Carrie & John Perock with others; Kathy Selvaggi & Don Vigliotti and Justin & Lindsay Macken. **Row two:** Maria Blohm (fourth from the right) & KPMG group.

CEO PERSPECTIVE

Preparing to announce funding decisions

By Bobbi Watt Geer, Ph.D.

By the time you read this, our board will have approved our new slate of Multi-Year Grants. These funding decisions are the result of a thoughtful process that taps the expertise of nearly 200 volunteer evaluators led by our expert Community Impact staff with the guidance of our Impact Cabinet and the approval of our board.

What has struck all of us in this process is how profoundly nonprofits and the people we serve are feeling the strain of rising costs for food, housing and basic necessities. Making funding decisions is difficult at any time, but especially now as needs continue to outpace resources: the number of nonprofit organizations seeking sustained support grew by more than 30% since our last cycle three years ago.

The tension between rising need and finite funding is one of the hardest realities we face at United Way.

Each grant proposal was reviewed by at least 10 staff and trained volunteer evaluators representing diverse expertise, lived experiences and community perspectives. A record number of volunteers, 180 in all, committed themselves to this work, supported by clear priorities, strong data and a refined rubric to score each proposal.

We look carefully at geography, age and demography served so that our grant investments reach as many of our communities as possible. We ask how the organization will help lift families above the ALICE (asset limited, income-constrained and employed) threshold into financial stability. And we have increased our emphasis on capacity building, the ways we support nonprofit operations, because organizations need to be strong to create lasting change.

Still, I know how difficult it is when an organization that a donor or staff member believes in is not funded. For United Way, a "no" is never a dismissal of mission or impact but a reflection of alignment with our priorities and that organizations are ready to hit the ground running. We offer all applicants feedback and, often, pathways to other funding streams that can help organizations succeed.

Donations made without restrictions on which agencies or cause benefit are so important to us: these gifts fund our Multi-Year Grants process and allow us to respond when and where the need is greatest.

Our Community Impact staff treat the nonprofit organizations we fund as true partners, answering their questions and offering support that goes beyond funding. This includes connecting agencies to our volunteer team for collection drives, offering feedback on how to strengthen their proposals for us and for other funders, and hosting convenings and training sessions to help nonprofits build capacity.

When we announce our newest slate of partner agencies in a few weeks, we won't be able to fund everyone but will have made funding decisions with the compassion, rigor and care our donors expect from us.

United Way for YOU

United Way's UW4Me mobile engagement tool is the fastest, easiest way to register for events, sign up to volunteer and track giving history. It's customized to you, so you easily find experiences that align with your interests and goals. It's free and easy to use. *Sign up today!*

100 YEARS STRONG

Join the Celebration!

United Way of Southwestern Pennsylvania celebrates our 100th anniversary in 2027! Now is the time to move forward, spread the word, engage the community and find out what's possible when we're all United. We've established a new 100th anniversary fund, the Fund for Transformation and Resilience, and we're more than half-way to our $40 million goal. This new fund will allow us to accomplish three key goals:

- To invest at least $2 million more each year in partner agencies who are helping people meet basic needs, move to financial stability and build for success in school and life.
- To be ready to respond immediately in the event of crises, such as the SNAP benefits halt or other unforeseen challenges.

- To fund innovative programs that strengthen the region's safety net. We will work with you to spread your pledge over multiple years.

We will also collaborate with you and your professional advisors to determine if planned gifts — such as estate plans, wills and life insurance — can help you support our 100th anniversary and meet your charitable goals.

Other opportunities include our forthcoming 100,000 Hour Volunteer Challenge. Beginning in 2027, we'll be inviting individuals, families and companies to team up with

United Way to significantly increase volunteerism in our region. We'll work together to address community issues like food insecurity and other basic needs, to collect much-needed items, and promote early literacy for young children and much more.

All Tocqueville Society members will be asked to contribute, in addition to your annual support, to the Fund for Transformation and Resilience. To learn more about how to donate and get involved, contact Lisa Kelly at *Lisa.Kelly@unitedwayswpa.org* or 412-456-6767 or Ryan Walker at *Ryan.Walker@unitedwayswpa.org* or 412-456-6705.

Contributions to our Fund for Transformation and Resilience support partner agencies help United Way rise to unforeseen crisis and also make it possible for volunteers to engage and give back. Pictured are: literacy initiatives at partner agency The Learning Lamp, volunteers at Build A Bike, and a student engaged in workforce training at partner agency Bidwell Training Center.

WEALTH OF KNOWLEDGE

How might changing tax laws affect sophisticated donors?

As tax policy continues to evolve, one constant remains: philanthropic investment is essential to United Way's ability to address urgent needs, strengthen families and expand opportunity across our community. Although federal tax changes taking effect for the 2026 tax year may influence the timing, structure or after-tax implications of certain gifts, they underscore the importance of philanthropy and the impact it makes possible.

For many donors, a key consideration will be how the new rules affect the relative value of itemized charitable deductions, particularly when evaluated alongside other planning priorities and existing giving vehicles.

Beginning with 2026 tax filings, charitable contributions claimed by itemizing taxpayers generally will be deductible only to the extent they exceed 0.5% of adjusted gross income.

The tax benefit associated with itemized deductions for higher income taxpayers may be further constrained. As a result, some donors may wish to revisit the pacing, asset mix or vehicles used for their charitable commitments.

Researchers at Indiana University's Lilly Family School of Philanthropy are examining how these provisions may influence charitable behavior nationally. Even as planning considerations shift, the broader conclusion remains the same: sustained philanthropic leadership continues to be a defining force in advancing community well-being.

There is also a broader opportunity embedded in these changes. The increased standard deduction — $15,750 for individuals, $23,625 for heads of household, and $31,500 for married couples — combined with a new above-the-line charitable deduction of up to $1,000 for individuals and $2,000 for married couples, may encourage broader participation in charitable giving. For organizations like United Way, that expanded participation matters alongside leadership-level philanthropy.

THE BOTTOM LINE: strategic philanthropy remains one of the most effective ways to meet immediate needs, invest in long-term solutions and deliver measurable impact across our region. In a changing tax landscape, generous support continues to be both consequential and deeply needed.

For donors considering how to maximize both philanthropic and tax efficiency, vehicles such as gifts of appreciated securities, donor advised funds, qualified charitable distributions and estate commitments may remain especially effective, depending on individual circumstances. We encourage each donor to consult legal, tax and wealth advisors to determine the approach that best aligns with personal objectives, overall planning and the legacy they wish to create.

Please note: donors should consult directly with their professional advisors as United Way does not provide tax advice through *Spotlight* or any other means.

ADVISORS INSIGHTS

Many Tocqueville Society donors have expertise as wealth managers, estate attorneys or CPAs.

In this occasional series, we're asking professional advisors to weigh in on issues that they're hearing from clients and colleagues. Watch for more advisor insights on our social media channels.

Q: How do you describe the importance of planned giving through wills and estates, donor advised funds and Qualified Charitable Distributions (QCD)s to a client's overall financial and philanthropic lens?

A: "Planned giving vehicles such as wills and estate provisions, donor advised funds and QCDs can all play an important role within a client's broader financial and philanthropic framework. The right approach depends on the individual's intentions and stage of life. For some, charitable bequests through an estate plan can create a lasting legacy while preserving flexibility during their lifetime. Others may benefit from donor advised funds that allow them to engage children and grandchildren in thoughtful, multigenerational philanthropy. For clients over age 70½, QCDs can be especially effective to support causes they care about in a tax efficient manner while satisfying required distributions."

— Deborah Graver, partner & chief compliance officer, Signature Wealth

Q: How have recent tax law changes affected your conversations with your clients? What specifically are you hearing about philanthropy and giving and are these changes affecting your personal charitable giving approach?

A: "Charitable giving is a deeply personal choice, and while tax incentives offer valuable benefits, the true motivation comes from a genuine desire to support our community. The increase in standard deductions means fewer taxpayers will itemize their deductions, which might lessen the tax-related incentive to donate. However, allowing an additional deduction for charitable contributions alongside the standard deduction provides a more direct reward for giving, even for those who don't itemize, potentially encouraging more donations."

— Laura B. Strobel, principal, PwC

A: "From my perspective, while the new 0.5% adjusted gross income floor does affect the tax side of giving, it really hasn't changed my clients' desire to be philanthropic. A big part of my role is helping clients think through how and when they want to give in a way that feels meaningful. We talk about whether they want to make that impact during their lifetime or through their estate, how they might involve their children, and which organizations and causes they care most deeply about. Once those priorities are clear, we can build the right strategy around them. In most cases, the heart behind the giving comes first, and the tax planning follows."

— David Riehl, financial advisor, Baird*

Learn more: Whether you are an individual or family interested in creating a lasting legacy— or you are an estate attorney, wealth manager or certified public accountant — United Way can assist with your charitable goals. Contact Linda Jones at *Linda.Jones@uwswpa.org* or Lisa Kelly at *Lisa.Kelly@uwswpa.org* at United Way of Southwestern Pennsylvania to start the conversation.

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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.

UNITED WAY
TOCQUEVILLE SOCIETY

UNITED WAY of Southwestern Pennsylvania

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