

TOCQUEVILLE SOCIETY & SENATOR JOHN HEINZ LEADERS IN PHILANTHROPY  
Recognizing Outstanding Philanthropy 2018 - 2019

# LEADERSHIP THAT LIFTS US ALL



  
TOCQUEVILLE

SENATOR JOHN HEINZ  
LEADERS IN PHILANTHROPY



United Way of  
Southwestern Pennsylvania



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Dear Friends,

As philanthropic leaders, visionaries and changemakers, you boldly demonstrate your commitment to making our community the best place it can be by gifting your time and treasure to help the most vulnerable among us. Collectively, you should be proud of the substantial difference you are making in the lives of people who most need our help. Together, Tocqueville Society Members and Senator John Heinz Leaders in Philanthropy contributed more than \$10 million to United Way’s 2018 Campaign, providing hope and critical support to:

- Young men like Zach (page 21), a student athlete who is learning how to respect himself and others while serving as a role model to his peers;
- Seniors like Joe (page 27), who is able to avoid isolation and loneliness by getting a friendly ride to the local senior center;
- Women like Shalisa (page 49), a veteran and college graduate, who found herself and her daughter on the brink of homelessness after unexpected tragedy; and
- People with disabilities like Michael (page 4), who searched tirelessly to find a home of his own that met his needs so he could live with independence.

On behalf of Zach, Joe, Shalisa, Michael, and the hundreds of thousands of other lives you’ve touched, thank you. You are true champions and together, when we fight to solve our region’s biggest challenges, we all win.

With gratitude,

Richard J. Harshman  
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Senior Vice President, Community Philanthropy and  
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TOCQUEVILLE

## The Tocqueville Society

United Way’s Tocqueville Society is comprised of philanthropic leaders and volunteer champions who give \$10,000 or more annually to United Way, creating a profound and lasting impact on the lives of all those who live and work here. In 2018, members contributed nearly \$10 million to the campaign.

The following categories of annual membership acknowledge increasing levels of generosity by Tocqueville Society donors:

### Order de Liberté

\$100,000+  
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## 2018 Top Tocqueville Corporations

United Way recognizes these corporations that had the largest number of Tocqueville Society donors for the 2018 campaign, regardless of company size or overall campaign total.

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UPMC .....	37
Deloitte .....	27
Kennametal Inc. ....	20
Highmark Health .....	18
(includes Highmark Blue Cross Blue Shield and Allegheny Health Network)	
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Reed Smith LLP.....	12
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## National Tocqueville Society Million Dollar Roundtable



Cumulative gifts totaling \$1,000,000 and more entitle donors to a lifetime membership in the national Alexis de Tocqueville Million Dollar Roundtable. Donations may be made by outright gifts of cash, stock or other property, or they may be deferred gifts.

We offer our heartfelt gratitude to the following individuals and private foundations whose extraordinary commitment as members of our Million Dollar Roundtable serve as the catalyst for positive, lasting transformation and revitalization in the Greater Pittsburgh community.

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## A little support led to the perfect new home

Michael, 32, was ready to move out on his own. But as a person with an intellectual disability, it was important to his parents, Lori and John, to find him a safe and affordable place near their home neighborhood.

“Michael can follow routines, but he struggles with change. He also has difficulty with judging safety, so we were looking for a community where shopkeepers and neighbors might begin to get to know him and support him as needed,” Lori explained.

After waiting four years, Michael received a Section 8 housing voucher, but he and his mom were unable to find an apartment that met these requirements. They went back on the waiting list for another five years, when Michael was selected again. This time, his mom discovered United Way’s Housing Connector program\* who supported her through the process.

“Because Michael doesn’t have a standard income, this funding was really critical to finding him an independent situation. Thankfully, we were connected with Sandra Nesbit at the Housing Connector, and



*“You can see how this new apartment has changed his sense of independence.”*

*- Lori*

After working together with the Housing Connector to get Michael an extension on his Section 8 voucher, Lori finally found an apartment that met all of Michael’s needs. Now, Michael is happily settled in his new apartment, has gotten to know some of his neighbors, and loves to talk about his new place.

“It’s pretty good living by myself. I like it,” Michael shared. “I walk up the street and buy a newspaper and coffee. I can walk to get ice cream, and I can walk to my parents’ house.”

Lori and John are so glad to have Michael settled and they are thankful for the support received from the Housing Connector program. “This is not an easy process for any family. I was really grateful to have someone on our team,” Lori said.

she helped us navigate everything,” Lori explained.

Lori and Sandra began pounding the pavement. They walked through Bellevue and Avalon looking for “For Rent” signs and scoping out locations that might work for Michael. “He doesn’t drive or take the bus, so the place needed to be walkable,” Lori said.

\*The Allegheny County Housing Connector, a partnership between United Way of Southwestern PA, ACTION-Housing, Allegheny Department of Human Services and the FISA Foundation, connects people with disabilities to affordable and accessible housing options in the community of their choice through various supports – the voucher is just one option. To learn more about the program, visit <http://actionhousing.org/>

## Tocqueville Society, Honoring 10+ Years of Commitment



**Robert & Irene Bozzone**

United Way recognizes and celebrates the following current contributors who have been members of the Tocqueville Society for 10 years or longer, and in doing so, have impacted the lives of many people in need in our community. Through dedication and continuous giving, these individuals demonstrate leadership by emphasizing their commitment to United Way's vision of building a stronger community. Their long-term support of United Way has allowed us to create long-lasting changes and address the urgent needs in our community.

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With Impact Fund contributions, United Way researches the needs in the community then works in collaboration with community and business leaders, nonprofits, schools and other institutions to build efficient, effective and innovative programs and initiatives serving local children and youth, families, seniors and people with disabilities. Initiatives such as 21 & Able, Open Your Heart to a Senior, United for Women and Mission United are helping local people seek a brighter future.

The following Tocqueville Society members and Senator John Heinz contributors have given a substantial percentage of their contribution directly to the United Way Impact Fund.

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## Putting lessons on respect into action Coaching Boys Into Men builds character

Seventeen-year-old Zach was a rising senior at Elizabeth Forward High School. He was the starting quarterback on the football team when he participated in United Way's Coaching Boys Into Men program. This program is an innovative, evidence-based program that partners with athletic coaches to help high school athletes practice respect toward themselves and others.



*“Through Coaching Boys Into Men, I’ve learned to be more respectful to women.”*

- Zach

“Through Coaching Boys Into Men, I’ve learned to be more respectful to women,” Zach said.

The program gives coaches specific content to help them better address and prevent relationship abuse. They are provided with tools and resources to address critical topics each week with their players, such as respectful relationships, harassment, consent, sexual assault, and more. The results have shown decreased sexual violence behaviors and increased bystander action from athletes involved.

“This has had a huge impact on my life and the lives of my teammates. Our coach is able to teach us these things because we’re in a comfortable setting,” Zach explained. Zach feels like the program also brought his teammates closer together. “It allows us to take what we learn and apply it to not just our lives at school, but our personal lives outside of school,” Zach remarked. “My teammates focus on holding each other

accountable for what we learned through Coaching Boys Into Men.”

Zach plans to attend a four-year college and play football upon graduating. To learn more about how United Way's Coaching Boys Into Men program is helping teach young men about healthy relationships and behaviors, visit [uwsdpa.org/coaching-boys-into-men/](http://uwsdpa.org/coaching-boys-into-men/).



Toasting the Titans



## Le Champion \$15,000 - \$24,999



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## Local senior stays social and active thanks to United Way

More than 50 years ago, Joe came to the United States from Czechoslovakia (now Slovakia) to visit family. What was intended to be a vacation turned into a home when his aunt became sick and Joe became her caregiver. He gained his U.S. citizenship in 1977.



“My aunt and uncle did not have any kids of their own, so I was glad to be here to help them until my aunt passed in 2006,” Joe said. Now, Joe is 81 and lives independently in the house his aunt and uncle built in Greenfield nearly six decades ago.

Throughout Joe’s adulthood, he struggled with leg and hip pain and is now unable to bend his knees. Despite that, Joe loves being out of his house socializing, gardening, and walking when he is able. Recently, he began visiting the local senior center where he has made friends and started exercising. He tried an Access Bus to get there, but it was a long

*“I can get to the senior center in a short time, and the drivers help me get in and out. It’s so helpful.”*

- Joe

Uber drivers are always very nice, and they let me sit in the front seat with the chair reclined, so I am more comfortable. The drivers help me get in and out,” Joe said.

Now, Joe is able to easily get to the senior center, and he has even started scheduling Uber rides to go other places, like church, coffee shops and physical therapy. It has helped change the quality of his life and enables him to socialize, meet new friends, and try new things.

drive with many stops and was extremely uncomfortable. “I can’t bend my knees, and on the bus, I have to sit in my wheel chair. It was painful,” Joe explained. “But I really like going to the senior center.”

Joe found support through a partnership with United Way, the UPMC Living-at-Home Program, and Traveler’s Aid where local seniors are able to schedule rides with Uber for free. “The



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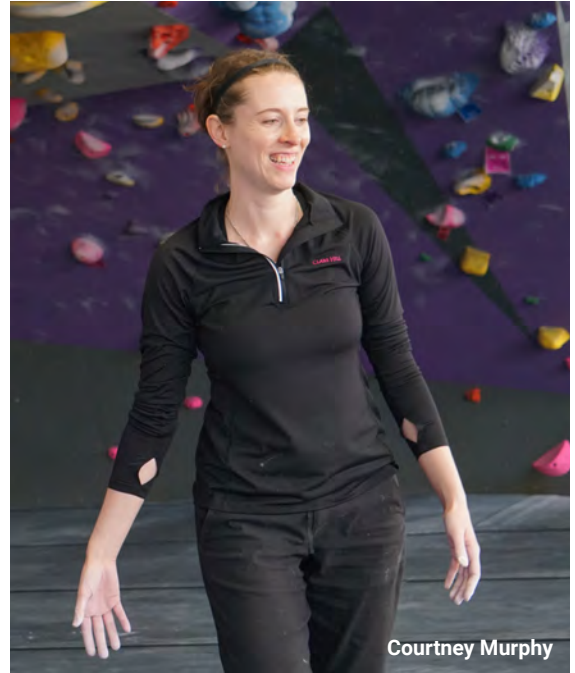
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**19 anonymous contributors**

## Blind man sees the difference a volunteer makes

In 2010, Jorge was managing an apartment building. He was the go-to problem solver for 48 families. It was not just a profession to Jorge, but a 24-hour-a-day calling. Then, it came crashing to a halt when a stroke suddenly left him without his vision, speech or memory.

Today, Jorge is still blind. But he has recovered his speech and memory, while regaining strength to walk using a cane. The 67-year-old lives in a high-rise apartment in Pittsburgh's Polish Hill, mostly independently, thanks to supports including United Way's Open Your Heart to a Senior program.

Jorge has been paired up with volunteer Todd Rosenfeld, who he calls his godsend. Todd picks Jorge up and takes him on bi-monthly grocery trips to the local Aldi and Dollar Store.



*"He is a blessing to me, a real godsend."*

– Jorge

"Todd takes me anywhere – for groceries, the bank, even my eye appointments," Jorge says, "And even on Sundays. He is there for me. I know I can call on him for help."

Jorge considers his journey a miracle, having worked hard with therapists to regain skills he had spent a lifetime taking for granted.

"Todd helps me out so I can go places," Jorge adds, noting that his sister who lives just a few blocks away, sometimes accompanies them. "She comes with us and buys her own things. Now Todd is helping her get along, too."

Jorge sometimes misses his 28-year-long career as a building manager, so he gets to know everyone in his building. He makes sure to introduce Todd to everyone there, too.

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Jewish Association on Aging

**Dave & Karen Winsko**

Westinghouse

**12 anonymous contributors**

## A veteran facing homelessness found the right support at the right time

When Shalisa, a veteran and college graduate, decided to leave a stressful job and pursue other opportunities, she and her fiancé were prepared to support themselves and Shalisa's 11-year-old daughter. She made plans to temporarily drive for Uber and Lyft until she figured out her next step, and together, the family would be financially stable.

That's when Shalisa's world came crashing down around her.

"In February 2017, my fiancé suddenly passed away, and days later I was in a car accident. No one was injured in the accident, but my car was wrecked. I wasn't able to drive for Uber or Lyft until I replaced my vehicle," Shalisa explained.

Things began spiraling out of control, and Shalisa lost her housing. She was aware of resources, like United Way's 2-1-1 and the Allegheny Link hotline, where she knew she could find support. Putting her pride aside, she made the call.

"They connected me with the Veteran's Leadership Program (VLP) and just days after I called, my daughter and I moved in to transitional housing," Shalisa said.

Shortly after, Shalisa was able to repair her vehicle, and she began driving for Uber and Lyft. She continued to work with VLP, a United



*"We were on the verge of homelessness, and now we have a home of our own. I'm so glad I made the call."*

– Shalisa

Way funded agency, on job coaching and counseling, and they encouraged her to apply for Habitat for Humanity's Veterans Build program.

"That September, I was accepted into the Habitat for Humanity program, and I started building my house," Shalisa continued. "At the same time, I was hired at Turtle Creek Valley Community Services as a service coordinator."

Over the next several months, Shalisa, along with her daughter, friends, family and volunteers, built her home, and by the end of April 2018, Shalisa and her daughter moved in. Habitat for Humanity

provided Shalisa with a 30-year mortgage with 0% interest.

"This is our forever home. I'm so glad my daughter can decorate her own room and finally have a place to bring friends," Shalisa said.

Shalisa is thankful for the help she received and knows her life could have played out differently without these resources.

"It's okay to reach out for help. I'm a college graduate, a veteran, and a successful person. I never thought I would have been there, but there I was," Shalisa said. "You just have to make the call. I did, and I'm back on my feet, a home owner and financially stable."

# United Way Leadership

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## Setting goals and learning to reach them through mentoring

As a sixth grader last year, Kalil was rowdy and a little unsettled at school. A year later, while still a rambunctious and lively student, he's learned a lot about respect and how to behave in class from his mentor, Vann.

Kalil joined United Way's Be a Middle School Mentor program last year, where he met Vann. "He helped me think about things differently. Mr. Vann helped me get along with my teachers and classmates," Kalil said.

After time spent together – filled with personal conversations, friendly competitions, and educational games and lessons – Vann agreed that the changes in Kalil's behavior were significant over the course of the year. "I think he is calmer and more adjusted to the environment. He will come in ready to have fun, but he'd follow the rules and instructions."

Not only that, Vann has helped Kalil set goals, and they worked together to figure



*"When I'm an adult, I want to mentor kids. It can really help someone my age learn new things."*

– Kalil

out how Kalil could attain them. "Kalil is considering being a video game designer when he grows up, so we looked at what he would need to do to reach that goal. And I think he saw that if he worked hard, he could do it," Vann shared.

Vann and Kalil are entering their second year of United Way's Be a Middle School Mentor program, and the two are looking forward to continuing their conversations.

"We have the whole year ahead of us, and I'm excited to play games and learn new things from Mr. Vann," Kalil said.

Vann encourages other adults to consider signing up to be a mentor with United Way. "I have a full-time job and a family, but this is important to me. Kids in our community need positive role models to look to for guidance," Vann said.

# Planned Giving

Whether you are managing a loved one’s estate or assets of your own, nothing is more satisfying than being able to leave a legacy on one’s community that continues to impact people’s lives. When you give to United Way through planned giving, you will be supporting meaningful work and can benefit from tax-free giving or tax reductions that provide a better financial return for your estate.

## NAME UNITED WAY 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 IN YOUR RETIREMENT PLAN

Designate United Way as a full or partial beneficiary to your retirement account

- Avoid potential double taxation on retirement fund gifts to heirs (estate tax 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 inimum 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 70.5

Both types of designations reduce the taxable estate.

## GIFT OF CASH OR STOCK

- Withdrawals from an IRA account must begin by 70.5

### GIVING STOCK VS. CASH

	Gift in STOCK	Gift in CASH
Size of your gift:	\$200,00	\$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 saving	\$85,100	\$120,800

\*assumes a 39.6% tax bracket

## UNITED WAY LIFE®

In 2018-19, United Way of Southwestern Pennsylvania launched **United Way Life®**, an insurance policy program that gives donors an easy way to leave a lasting legacy on the community. With United Way as the beneficiary, no gift is more powerful, or more lasting.

### A Once in a Lifetime Gift

No matter your stage in life, now is a great time to consider a life insurance policy that is a protected gift to United Way. When you pay the **United Way Life®** policy premium, United Way is named the beneficiary, and upon the death of those names in the policy, that gift becomes exponentially bigger. Unlike typical United Way donation, **United Way Life®** is a gift that multiplies in value - as much as 5-8 times or more of 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.

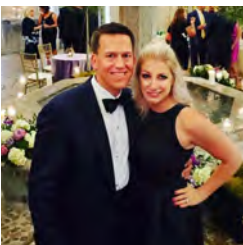
### Pay a Little, Give a Lot.

- The cost of the gift, paid as premium, is multiplied substantially when United Way receives the policy payout
- The premium payment is further offset by 50% matching dollars made possible by generous United Way donors
- The policy premium is also tax deductible

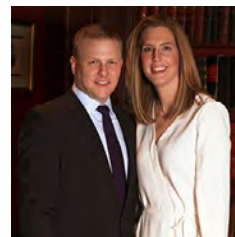
### Add United Way Life® to Your Giving Strategies.

- Creating a life policy is easy and affordable
- In just a few simple steps, a policy of \$250,000 or more can be created with your own agent or directly through United Way
- The premium is paid over five years, or you can choose to pay in full upfront
- The premium is in addition to your current annual giving
- **United Way Life®** giving does not disrupt your current estate plan

### Thank you to United Way Life® inaugural donors:



Amy & H. Edwin Haller, IV



Christine & William J. Blose

A **United Way Life®** gift is a vehicle for the future, improving lives for those who need it most. Your gift of over \$250,000 will be recognized today, giving you lifetime membership in the United Way Tocqueville Legacy Circle, a worldwide movement of forward-looking leaders extending their impact for generations to come. For more information, contact Linda Jones at [Linda.Jones@unitedwayswpa.org](mailto:Linda.Jones@unitedwayswpa.org) or 412-456-6768.

## Employee Leadership Giving by Company

Company	L	R	H	T	TL
UPMC	424	58	4	37	523
The PNC Financial Services Group, Inc.	277	37	6	39	359
University of Pittsburgh	221	20	2	11	254
Highmark Health (includes Highmark Blue Cross Blue Shield and Allegheny Health Network)	196	22	4	18	240
PPG	115	13	3	5	136
Covestro LLC	80	4	2	5	91
Eaton Corporation	71	11	3	2	87
Federated Investors, Inc.	70	7	2	8	87
UPS	76	6			82
Deloitte	36	10	5	27	78
FedEx Corporation	56	4	4	14	78
Kennametal Inc.	45	6		20	71
Hefren-Tillotson, Inc.	42	10		15	67
Naval Nuclear Laboratory	61	6			67
Duquesne Light Company/IBEW Local 29	61	3	1	1	66
Giant Eagle	55	7		3	65
PwC	20	10	9	17	56
Buchanan Ingersoll & Rooney PC	35	4	2	12	53
K & L Gates LLP	25	5	6	12	48
Equitrans Midstream Corporation	19	13	8	6	46
Eat'n Park Hospitality Group, Inc.	38	2	1	4	45
Duquesne University	41	1		2	44
Ernst & Young LLP	22	3	2	17	44
Peoples	36	2		1	39
Reed Smith LLP	20	4	3	12	39
Allegheny Technologies Incorporated	24	3	4	7	38
EQT Corporation	18	4	2	13	37
Schneider Downs	25			11	36
United Way of Southwestern Pennsylvania	28	4		3	35
United States Steel Corporation	27	2	1	2	32
First National Bank of Pennsylvania	22	3	3	2	30
NOVA Chemicals Inc.	22	4	3	1	30
Cohen & Grigsby, P.C.	15	6	1	7	29
Enterprise Rent-A-Car Company	25	1	1	2	29
Bechtel Plant Machinery, Inc.	24	2		1	27
Westinghouse	21	5	1		27
Dollar Bank	20	4	1		25
Pittsburgh Steelers Sports, Inc.	16	5	1	3	25
Carnegie Mellon University	16	4	1	2	23
KPMG	3	4		15	22

### LEADERSHIP GIVING KEY

L Leadership..... \$1,000 - \$2,499  
R Rooney..... \$2,500 - \$4,999  
H Heinz ..... \$5,000 - \$9,999

T Tocqueville .....\$10,000+  
TL Total



## Employee Leadership Giving by Company

Company	L	R	H	T	TL
Northwestern Mutual	9	1		12	22
Bayer Corporation	15	6			21
Calgon Carbon Corporation	16	2	1	2	21
Curtiss-Wright	19	2			21
Jones Day	9	5	1	5	20
Comcast NBCUniversal	15	4			19
MSA	14	3	1	1	19
Wabtec Corporation	13	3		3	19
Clark Hill PLC	12	2		3	17
Port Authority of Allegheny County	15			2	17
Bayer Radiology LLC	10	4	1	1	16
Koppers Inc.	10	2	1	3	16
Eckert Seamans Cherin & Mellott LLC	11	1	1	1	14
Wells Fargo & Company	10	1	2	1	14
Williams	9	4		1	14
LANXESS Corporation	11	2			13
ATI Flat Rolled Products	11	1			12
Citizens Bank of Pennsylvania	10	1	1		12
PJ Dick/Trumbull/Lindy Paving Family of Companies	8	1	1	2	12
Gateway Health Plan	9	1		1	11
Cabot Oil & Gas Corporation	6	4			10
Robert Morris University	10				10
State Employees Combined Appeal	8	2			10
U.S. Bancorp	9	1			10
Carmeuse North America	7	1	1		9
Elliott Company	7	2			9
Tucker Arensberg, P.C.	6	2		1	9
Alcoa, Inc.	8				8
Arconic	5	2	1		8
Bombardier Transportation	7	1			8
Oxford Development Company	4	2		2	8
ThermoFisher Scientific	8				8
VisitPittsburgh	8				8
ABB Inc.	4	3			7
ALCOSAN	7				7
Matthews International Corporation	5		1	1	7
Pittsburgh Post-Gazette	7				7
Alcoa Retirees	4			2	6
Blank Rome LLP	2		1	3	6
Excelsa Health	5			1	6
Housing Authority of the City of Pittsburgh	5	1			6
MARC USA	3		1	2	6
Vitro Architectural Glass	5	1			6
Cigna	5				5
First Commonwealth Bank	2	3			5
Gannett Fleming, Inc.	5				5
Henderson Brothers	3			2	5
Horty Springer & Mattern PC	3	2			5
S&T Bank	3	2			5

## Employee Leadership Giving by Company

Company	L	R	H	T	TL
Willis Towers Watson	3	2			5
Allegheny Conference on Community Development	3	1			4
BDO USA LLP	4				4
Braskem America	4				4
Coghill Investment Strategies LLC	4				4
Dickie McCamey & Chilcote PC	2	2			4
ECHO Realty, L.P.	2	1	1		4
Emerson Process Management Power & Water Solutions, Inc.	4				4
Erie Insurance Group	4				4
Goldberg Persky & White PC	1	1		2	4
KeyBank	3			1	4
L. B. Foster Company	3			1	4
Morgan Lewis & Bockius LLP	3	1			4
St. Vincent College	4				4
The Travelers Companies, Inc.	3			1	4
United States Steel Corporation - Retired	1			3	4
ACTION-Housing, Inc.	2	1			3
Babb, Inc.	1			2	3
Boys and Girls Clubs of WPA	3				3
Butler Eagle-Eagle Printing Company		3			3
Centene Corporation	3				3
Duquesne Club	3				3
Federal Home Loan Bank of Pittsburgh	2	1			3
Gateway Financial Group, Inc.	2			1	3
Holy Family Institute	3				3
Jewish Association on Aging	1	1	1		3
Maher Duessel	3				3
McGuireWoods LLP	3				3
Novum Pharmaceutical Research Services		1		2	3
Porter Wright Morris & Arthur LLP	2	1			3
Powerex Inc.	3				3
Principal Financial Group	2	1			3
Reiferson Dee PLC	1	1		1	3
Ricoh Americas	3				3
Seton Hill University	3				3
UBS Financial Services	3				3
Universal Stainless & Alloy Products, Inc.	2	1			3

### LEADERSHIP GIVING KEY

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 R Rooney ..... \$2,500 - \$4,999  
 H Heinz ..... \$5,000 - \$9,999

T Tocqueville ..... \$10,000+  
 TL Total

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