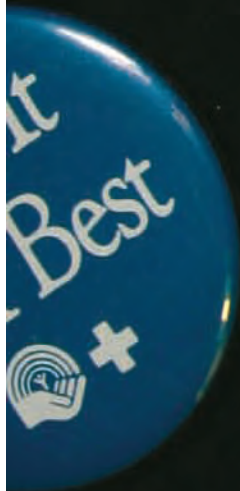
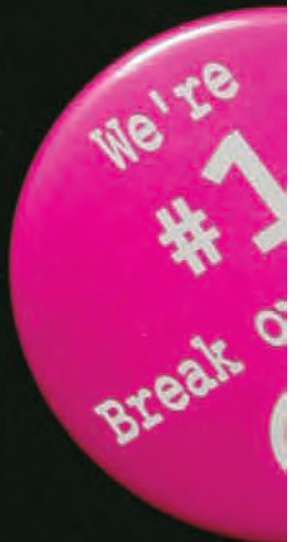


United Way

90TH ANNIVERSARY

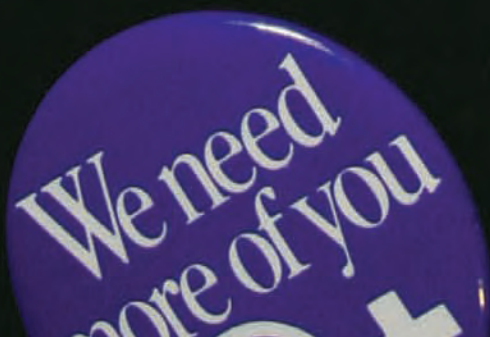
Rochester's barometer of philanthropic pride has a rich history and a challenging future.

Special section begins on page 16.



ROCHESTER BUSINESS JOURNAL

RBJ



A long tradition of generosity as a way of life

Eastman set the trend; philanthropy remains area's signature style

By SHEILA LIVADAS

When Louise Carcelli landed a job in 1940 at the Community Chest of Rochester and Monroe County Inc., she did not know if she would stay long: Carcelli had her sights set on working at Eastman Kodak Co.

A poster at the Community Chest, the forerunner to the United Way of Greater Rochester Inc., led Carcelli to rethink her plans. Depicting a wistful little girl on crutches, the poster read, "Suppose Nobody Cared?"

Forty-four years later—through war and peace, civil rights advances, technology debuts and hairstyle changes—Carcelli wrapped up her administrative career with the United Way.

"I saw the staff grow from 12 to 72. It was the most exciting time in my life," says Carcelli, now a retiree living in Pittsford.

Celebrating its 90th anniversary this year, the United Way of Greater Rochester began in 1918 as the Rochester Patriotic and Community Fund Inc., organizing wartime agencies' fundraising appeals. Syracuse and Columbus, Ohio, already had war chests by then, but Rochester's broke new ground by inviting local philanthropies into the fold.

Kodak founder George Eastman supported the fledgling fund in word and deed. He gathered local movers and shakers at his East Avenue mansion to strategize about unifying fundraising efforts. And he donated \$600,000 during the first campaign, which surpassed its goal of \$3.75 million by more than \$910,000.



Photo by Kimberly McKinzie

"We did strive for perfection," Mary Jo Favata says of working at the Community Chest from 1949 to 1991.



Photo by Kimberly McKinzie

Rochester became a national leader in per-capita donations after the Community Chest launched payroll giving in the late 1920s, says William McCullough, former executive vice president for corporate affairs.

Under Eastman's guidance, the seeds of philanthropy sprouted across Rochester, says William McCullough, former United Way executive vice president for corporate affairs.

"When George Eastman said, 'Here's a good idea that we ought to be supporting,' people listened to that and responded to it because of his leadership and influence in the community," says McCullough, who retired in 2006.

With support from Eastman and other area industry titans, ordinary people began digging into their pockets to help the fund, leading the first campaign to attract 103,000 donors.

World War I ended in November 1918, but a need for unified fundraising in Rochester marched on. Leaving the Patriotic and Community Fund name behind, the Community Chest of Rochester and Monroe County launched another campaign in 1919 for area social service agencies. The "Suppose Nobody Cared?" slogan, coined by Eastman, figured prominently in the effort.

The Community Chest made several sound decisions early in its history that secured its status as a model agency, McCullough notes. One of those moves involved establishing an endowment long before other community chests did.

Another key decision instituted payroll deduction giving around 1920.

"That amount over the course of a year results in a larger gift than someone would get if hit with a request and wrote a check that day," McCullough says, "so then people were able to lock into a level of giving."

Payroll deduction at Kodak and other local employers also set up the Community Chest to become a national leader in per-capita giving,

McCullough adds.

"What struck me when I came here to Rochester was the level of business leadership that was taking an active volunteer role in various levels of the Community Chest," says McCullough, who worked in Dayton, Ohio, prior to relocating here in the 1970s.

Though donations dwindled during the Great Depression, an important effort toward evaluating the Community Chest and its participating agencies plowed ahead. From 1937 to 1942, outside specialists conducted eight rounds of efficiency surveys. As a result, some local service agencies were merged or shuttered.

The Community Chest faced challenges again during World War II, when the need for human services soared. The peacetime Community Chest became the Rochester Community and War Chest and expanded its support base to all Monroe County

towns and villages.

As a new secretary in 1949, Greece resident Mary Jo Favata felt a strong sense of camaraderie at the Community Chest. Staffers were not allowed to drink coffee or listen to the radio at their desks in those early years, she says, "but it didn't seem to bother any of us." Dress-down days were unheard of, and many women on staff wore white gloves to the office.

Favata also remembers her supervisors' exacting standards for various tasks, including typing individual donor pledge cards and using carbon forms to make copies of letters.

"We did strive for perfection," says Favata, who retired from the endowment and planned giving division in 1991.

Despite waves of international conflict and strife, the Community Chest missed its campaign goal only once between 1946 and 1970. Local per-capita donations rose from \$3.43 in 1921 to \$12 in 1966, setting a national record.

In 1973, the Community Chest became the United Community Chest of Greater Rochester. This reflected a merger of the former Community Chest, which raised and allocated funds, with the Council of Social Agencies, which studied community needs. The change set the stage for "some pioneering work on what the community outcomes are that we should all be concerned about," McCullough says.

In keeping with the national United Way movement, the United Community Chest became the United Way of Greater Rochester in 1980. Since then, the organization has remained a model for United Ways elsewhere, attracting more than 10,000 volunteers to this year's Day of Caring and raising more funds in 2007 than the Albany, Syracuse and Buffalo United Ways combined.

Retired staffer Carcelli, whom the local United Way honored this fall for her 68 years as a donor, says she is not surprised that Rochesterians have maintained such strong support for the organization.

"I think we grew up with that philosophy, of helping," she says.

Sheila Livadas is a Rochester-area freelance writer.



Photo by Kimberly McKinzie

Louise Carcelli began working at the Community Chest in 1940—and contributed to the campaign in each of the 68 years that followed.

Today's United Way faces realities of a new age

Funding is no longer enough; goal is to spark involvement

By NATE DOUGHERTY

When Peter Carpino talks about the evolution of the United Way of Greater Rochester Inc., he is apt to fall into the familiar lingo he picked up during the years he spent as a marketing director. To him, one of the organization's most important changes is in its value proposition—market-speak for what customers get for what they pay.

The use of marketing terms is appropriate: To reach new audiences, the organization is undergoing a campaign to rebrand itself and the local role it serves. In the past, the value proposition was a once-yearly campaign to benefit the community and fund a group of organizations providing worthwhile services.

As donors have gained the ability to click a button on a Web site to make direct contributions, the need for the United Way as a funding channel to other agencies has dropped, Carpino says.

"The value is not that we are just a conduit to raise and distribute funds, but (that we have a) strategic intent to advance the common good," says Carpino, who took over as United Way president and CEO in 2005. "That's about this notion that we're creating opportunities for a better life for all, which is a very different model than saying we're funding agencies."

United Way has adopted the national model of engaging the larger community in advancing the common good, which comes with the marketing hook Live United. While, to some branches, Live United may be viewed as little more than an advertising slogan, Carpino believes the difference will come only with a full implementation of the idea.

Live United is based on a simple concept: People who feel engaged in a certain interest become more likely to give of their time, energy and money. To get people involved, United Way officials plan to run campaigns for volunteers the same way it currently campaigns for donations.

"The notion is that we will be able to approach our community saying, 'This is what our need is,' and if we need 300 volunteers for literacy programs we can put out a call for them," Carpino says.

Carpino spent the bulk of his professional career working for the United Way both here and in northeastern Pennsylvania. He does not want to be seen as an outsider swooping in to make drastic changes to what the local agency has long stood for. He speaks glowingly about its origins 90 years ago, when organizers raised \$3.5 million in just four days to fund a war chest. Carpino has a framed picture of the symbolic chest in the hall outside his office.

Rochester's United Way still carries the trappings of its beginnings when it was fueled by the generosity of George Eastman, founder of Eastman Kodak Co. The annual campaign takes place in the spring—all other branches in the nation opt for the fall—because that was when Eastman distributed bonuses to his employees. Through the decades, the local branch has been one of the nationwide leaders in per-capita giving, regularly pulling in sums higher than Buffalo and Syracuse combined.

"I think the fact that we've had that kind of track record even with all the local economic changes—that we can sustain that kind of effort—is an indication of the importance of what United Way means for the community," says Carlos Carballada, Rochester economic development commissioner who served as chairman of the United Way board of trustees and twice led the annual campaign.

Still, Carpino realizes that United Way must change with the times. Its donor base has shrunk by nearly half in the last 20 years, from 212,000 to 108,000. This reflects big shifts in the local economy: Jobs have moved from manufacturing to the service sector, and banks and financial services firms have consolidated. Coupled with increased competition for charitable dollars, the need for the organization to reposition itself is urgent, he says.

Building the base

To build the volunteer base, United Way is using more effective methods of keeping in touch. For example, culling volunteers' personal e-mail addresses rather than just work accounts will keep them from disappearing into cyberspace when they change jobs.



Photo by Kimberly McKinzie

"Often they don't want to give to the United Way because it feels like a black hole to them," United Way president and CEO Peter Carpino says of the newest generation of professionals. "If they feel engaged in these causes, their dollars will follow."

From this list, United Way will send e-mails targeted to volunteers with particular interests, informing them of needs that fit their interests and of related pending legislation. This notification also will include a way to voice their opinions on the matter to state and local lawmakers.

The message Carpino has heard from young professionals is that they know United Way only for its campaign and do not really understand where the money goes. Targeted volunteering will help them see just where the money goes and who it benefits, he says.

"Often they don't want to give to the United Way because it feels like a black hole to them," Carpino says. "If they feel engaged in these causes, their dollars will follow."

An important part of the Live United campaign in-

volves volunteers telling the story of their own connections with United Way. Visitors to the organization's Web site see a montage of everyday people—from college students to families to a pair of school-age girls—wearing Live United T-shirts and describing their volunteering experiences.

This focus on the individual donor is itself a radical departure from tradition. In the past, United Way employed a business-to-business model of operation in which it sought out community business leaders to marshal efforts, Carpino says.

"We need to engage our young professionals now because they're the future of our organization," Carpino says. "We make a mistake if we ignore that and don't

Continued on page 18



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Local pledges through the years

- 1917—U.S. enters World War I
- 1918—\$4.66 million pledged; 103,658 contributors; World War I ends
- 1919—\$1.26 million; 61,807 contributors
- 1929—\$1.45 million; stock market crashes
- 1930—\$1.59 million
- 1933—Contributors number 62,862, lowest since 1919
- 1936-49—Pledges surpass goals for all years except 1938 and 1945
- 1941—\$1.29 million; U.S. enters World War II
- 1942—\$2.42 million
- 1945—World War II ends
- 1946—\$1.86 million
- 1951—\$2.49 million
- 1963—\$5.96 million
- 1973—\$11.36 million
- 1979—\$16.61 million
- 1989—\$32.89 million; 218,946 contributors
- 1999—\$35.34 million
- 2000—\$36.26 million—highest pledge total
- 2001—\$36.24 million; 162,463 contributors
- 2002—\$35.82 million
- 2003—\$34.62 million
- 2004—\$35.00 million; 140,564 contributors
- 2005—\$35.51 million
- 2006—\$34.55 million; 128,763 contributors
- 2007—\$33.50 million
- 2008—\$32.20 million; 108,000 contributors

Source: United Way of Greater Rochester Inc.



NEW REALITIES

Continued from page 17

create opportunities for them to become engaged and create an understanding of what they can do and how they can help.”

Keeping focused

The path ahead will not be smooth, he warns. With an uncertain economy creating a similarly uncertain fundraising climate, the upcoming campaign goal will be much more difficult to gauge than in the past. Carpino expects the goal will be announced later than usual as local fundraising factors are carefully studied. He also plans to meet with agencies the United Way funds to keep them aware of what changes could be coming.

The agency also is taking steps to funnel contributions as efficiently as possible. It is working with the Rochester Area Community Foundation on a project to track indicators like teenage pregnancy, literacy and crime rates, which will allow it to pinpoint the most pressing local needs. It will also study the programs it funds to make sure dollars go where they have the most use.

“We will put more focus on funding programs with measurable, documented results instead of things we feel good about and just suspect are good for the community,” says Amy Tait, local real estate developer and current board chairwoman. Tait also is one of the faces greeting visitors on the Web site, proudly showing off her Live United shirt underneath a gray sweater.

Carpino remains confident that United Way will respond in the way it always has, with the overwhelming

support that has made the Rochester community famous for its philanthropy.

“Our strength still comes from the tens of thousands of people involved and the work of those volunteers and staff who have gone before us,” Carpino says. “Our challenge going forward is not just measured by how much money we’re raising but how we continue to be volunteer-driven in an era when people have less and less time to volunteer.”

“Companies don’t have the time or resources to have people go out and knock on doors and distribute pledge cards through neighborhoods the way they used to. That is why we are working so hard to change our business model and reach those individual donors.”

natdougherty@rbj.net / 585-546-8303



Photo courtesy of the United Way
A billboard on the Powers Building urges passersby to give to the Rochester War Chest during World War II.



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Bottom-line thinkers praise focus on results

Methods have changed,
but business' support
of United Way remains

By **DEBBIE WALTZER**

Samuel "Tom" Hubbard and United Way of Greater Rochester Inc. go back a long way.

In 1972, Hubbard was a new employee at Lincoln Rochester Trust Co. He signed up to be an individual subscriber team captain for United Way and walked door-to-door in the Bulls Head neighborhood, soliciting donations.

"We asked for \$5, \$10—whatever residents could give," recalls Hubbard, chairman of the board of High Falls Brewing Co. LLC. "My very first impressions of United Way have remained the same today: It is a terrific organization that spreads dollars around to people in our community who need it the most."

Supportive friends are crucial for any organization. The United Way has a cadre of key community leaders who have made lifetime commitments to helping the organization.

Along with Hubbard, friends include Mary Ellen Burris, senior vice president for consumer affairs at Wegmans Food Markets Inc.; James Bertolone, local president of the American Postal Workers Union and local president of AFL-CIO for Greater Rochester; and Deborah Stendaridi, vice president of government and community relations at Rochester Institute of Technology.

Each of these individuals has served United Way in a leadership role for years. To a person, they are outspoken champions of the organization's mission and operation.

"United Way is a great organization and a tremendous community asset," Stendaridi says. "United Way is far more than a fundraising organization. It brings people together to find solutions to community problems."

Stendaridi, a 29-year RIT veteran, helped raise funds and awareness several years ago for a UW initiative called United Neighborhood Centers of Greater Rochester. The plan was to consolidate community centers—thus reducing duplication of administrative structures and costs.

Last year, while visiting the newly formed Community Place, she was delighted to see the plan had come to fruition.

"The place was so alive," she says. "They had a terrific and energetic executive director, and dozens of seniors were enjoying a variety of activities as part of their day program."

Hubbard will never forget his first visit to Mary Cariola Children's Center. "It was so moving to see the work done by very patient, loving and caring people," he says. "The staff members' singular goal was to help children with special needs realize their full potential."

Bertolone identifies closely with United Way's mission.

"I came from a working-class family that taught us to reach down in order to lift up others," he says. "United Way's work makes a huge difference in people's lives."

Bertolone says he looks forward to attending United Way's kick-off event because he knows he will hear moving stories about the organization's impact on



Photo by Kimberly McKinzie

James Bertolone credits working-class roots with inspiring him to help others.

people's lives.

"I remember in particular one recent story of a single parent with a disabled child," he says. "The mom was struggling to make ends meet while earning a modest \$10 per hour and going to school at night, but she became successful through help that she received from United Way."

The organization focuses on results and measurable goals, Bertolone says. "They're not just handing out money. They're looking for real results."

Burris says she sees results of United Way's efforts every day. In 1987, Wegmans founded the Wegmans Work Scholarship Connection program: At-risk high-school students get help realizing their potential through part-time jobs with the company and one-on-one academic and career mentoring. To date, more than 1,000 young people have completed the program and have earned their high school diplomas, landed jobs and, in many cases, enrolled in college.

Burris tells the story of one such participant. Facing numerous obstacles as a teen—including the death of his parents, drug use and gang activities—the student nonetheless plunged into the work-scholarship program.

The student grew up to be a success story. He earned his MBA from a local college and has a management job at a Wegmans store.

"I've always been a huge supporter of United Way's work because I believe that it is not only the most efficient way to solicit donations, but it also helps our community provide dollars where they are most needed," Burris says.

"United Way is such a huge part of the fabric of our community," says Hubbard, who is United Way vice chairman, treasurer and chairman-elect. "The organization is an essential part of the quality of life within the Rochester community."

People in the community are "struggling and facing real challenges," Stendaridi adds. "Decisions at United Way are not made in a top-down fashion. Rather, the organization is committed to engaging people and soliciting input from all segments of our community. ... The organization's role is more critical today than ever before."

Debbie Waltzer is a Rochester-area freelance writer.

A steady presence in peacetime and war

1918

Community Chest is founded in a meeting at George Eastman's home. The first campaign raises \$4.66 million in one week; 103,658 contributors make pledges. Rochester is among the first cities to develop a single appeal drive for not only war relief but local health, welfare and recreation agencies.



Mr. and Mrs. Morley Stern as a permanent memorial to their son. Stern was president of Michaels, Stern & Co., a clothing manufacturer.

1928-29

Payroll deduction begins.

1940s

The peacetime Community Chest becomes the Rochester Community and War Chest. The campaign expands to include all towns in Monroe County.

1946-1970

The campaign misses its goal just once.

1927

Community Chest creates an endowment committee after receiving a special contribution of \$50,000 from



1973

The Council of Social Agencies and the Community Chest act to dissolve their organizations, creating the United Community Chest of Greater Rochester.

1975-76

The Chest assumes administrative responsibilities for the United Ways in Wayne and Ontario counties, eastern Orleans county and the city of Geneva, creating an areawide United Way system.

1980

In April, the organization changes its name to United Way of Greater Rochester to be consistent with the national United Way movement.

1992

The African American Leadership Development Program starts.

1999

Greater Rochester Community Endowment Fund reaches \$110.9 million, the largest in the country.

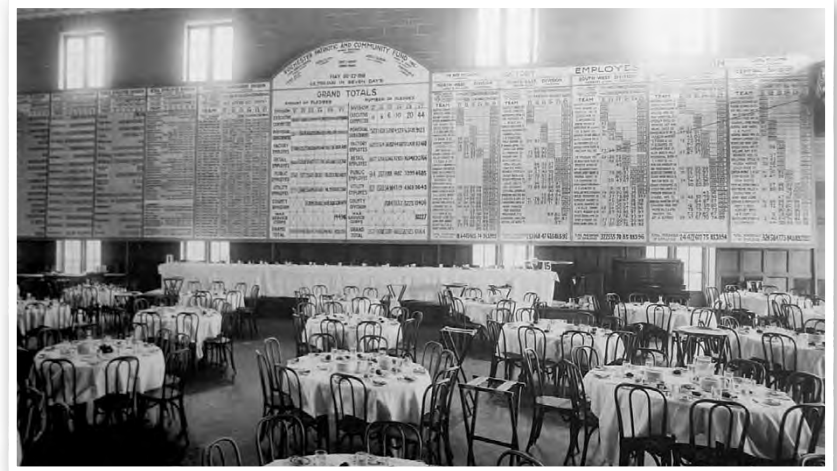
2005

Peter Carpino becomes the fifth president of United Way of Greater Rochester.

2008

More than 400 local donors who have been giving for more than 50 years are honored by the United Way. More than 5,000 donors have given for 20-plus years.

All photos courtesy of the United Way



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