TOCQUEVILLE SOCIETY AND CORPORATE ENGAGEMENT JOINT CABINET

BRAND ADVOCATE TOOLKIT
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*Excited to share this with your networks? See page 6–7*
Thank you for being a vital advocate for United Way of New York City (UWNYC). Without influential leaders like you opening doors to new partnership opportunities, UWNYC would not be able to spearhead efforts for equitable change in our city. Together, we can improve the lives of New Yorkers throughout the five boroughs.

As New York City’s needs are greater than ever, the demands of our cabinet members will be greater. So, let’s get started!

In this toolkit, you’ll find resources to empower you to be brand advocates for UWNYC, including an overview of our mission, what we do and why it matters, and the impact of our work. Additionally, we’ve prepared helpful templates and tips for connecting with potential partners.

We look forward to working with each cabinet member along with UWNYC staff in making the city a better place for all New Yorkers. Once again, thank you for your dedication and commitment to making New York City more equitable for everyone. We couldn’t do it without you.

Warm regards,

David Alessio, Tocqueville Society Cabinet Chair

Greg Greenberg, Corporate Engagement Cabinet Chair
Tocqueville Cabinet Overview

The UWNYC Tocqueville Society (“TS”) is an impassioned group of professionals dedicated to providing leadership, support, knowledge and experience to activate key programs, initiatives, and solutions to improve the economic health of NYC. The group is a community of enthusiastic change-makers, passionate about advocating and creating long-term community development in our city. The Tocqueville cabinet are goodwill ambassadors for UWNYC within their own organizations, communities, and personal networks.

Roles and Responsibilities of Cabinet Member

- Become familiar with UWNYC’s goals, mission, and vision to articulate the organization’s work.
- Champion UWNYC within your professional and personal networks and help implement fundraising best practices.
- Recommend and open doors to potential new donors (individuals and/or organizations) for UWNYC.
- Engage and deepen relationships with current members and prospective members.
- Inspire implementation of key strategies and assist in problem solving with fundraising initiatives.
- Report to Cabinet Chair and UWNYC staff regularly on progress against overall goals.
- Solicit and identify 3-5 new TS members via personal visits, email, and events.
- Inspire and educate members by sharing your personal story/journey and investment in UWNYC.
- Contribute a personal gift to UWNYC of $10,000 or more.

Key Takeaway:
The Tocqueville Society are professionals who contribute a gift of $10,000 or more and provide leadership and experience to key UWNYC programs.

David Alessio, Chair, CIBC
david.alessio@cibc.com

John Bowen, Meta
Jcb@fb.com

JP Paquin, Brown Brothers Harriman
jp.paquin@bbh.com

Suzanne Cutler
Corporate Engagement Member Overview

The UWNYC Corporate Engagement Cabinet is a diverse group of volunteer leaders who develop and implement strategies to meet UWNYC’s annual corporate engagement goals. Cabinet members are goodwill ambassadors UWNYC within their own organizations and in the greater community, advocating for partnership with and investment in UWNYC.

Roles and Responsibilities of Cabinet Member

• Become familiar with UWNYC’s goals, mission, and vision to articulate the organization’s work.

• Champion UWNYC within their company and help implement corporate engagement best practices including community engagement opportunities, professional development & leadership opportunities, and fundraising for UWNYC’s impact priorities.

• Manage a small portfolio of external corporate partnerships to inspire implementation of key corporate engagement strategies, assist in problem solving, and build connections across companies.

• Lead executive communications via 5-7 external meetings with other corporate leaders.

• Liaise with Cabinet Chairs and UWNYC staff regularly on progress against overall goals.

Key Takeaway: The Corporate Engagement Cabinet develops and implements strategies to meet UWNYC’s annual corporate engagement goals.

CORPORATE ENGAGEMENT CABINET MEMBERS & RESPONSIBILITIES

Greg Greenberg, Chair, American Express
Gregory.B.Greenberg@aexp.com

Lauren Israel, CIBC
lauren.israel@cibc.com

Alena Casey, Meta
acasey@fb.com

Christine Reyling, Fifth Third Bank
christine.reyling@53.com

Rita German, JP Morgan Chase
rita.m.german@jpmchase.com

Bill Fahrlender, UPS
bfahrlender@ups.com
The questions below can be used as conversational starters when meeting with prospective partners.

**Things to Keep in Mind:**

1. Think about how you can leverage your existing connections to open conversations with those who make budgetary, employee engagement, and partnership decisions, or are high net-worth individuals.

2. Notes will be provided by UWNYC ahead of the meeting, giving context for any existing relationship.

3. A UWNYC relationship manager will join you in these meetings. You can opt to set up a meeting directly, or the relationship manager can assist with scheduling.

**Open Conversational Questions:**

- How can we best deliver value to this relationship/partnership?
- How would you describe the work of United Way?
- What do you most like about your relationship with United Way?
- What are the biggest points of dissatisfaction?
- Which of these would add the most value to your company?
Business and Philanthropic Goal Questions:

- What are the three biggest business challenges your company faces?
- And in response, what are your business and corporate social responsibility (CSR) goals over the next 3-5 years?
- Are the corporate foundation’s goals and priorities aligned with the company’s top priorities? (If the company has a foundation)
- Are your employees’ personal interests aligned with CSR priorities? How do you test those assumptions?
- How do your employee engagement activities support the company’s strategic goals?
- What are your top policy goals? How does your company advocate for those goals?

Email Template

Hi [name],

I am reaching out to you as a member of United Way of New York City’s [Tocqueville/Corporate Engagement] Cabinet. Insert a sentence about how you know this contact or organization.

Working across sectors, UWNYC is uniquely positioned to transform the lives of all New Yorkers. I would love to schedule a call with you and a member of United Way’s staff to discuss how UWNYC might be able to partner with [Company or individual] to best suit your [corporate/philanthropic] needs. Our availability is below; please let me know when you would be able to speak.

Looking forward to hearing from you!

Best

[Your name]
UWNYC VISION

Focus Areas
As a backbone organization, UWNYC is uniquely positioned to help ethically rebuild New York City as the convenor for cross-sector collaborations between business, government, foundations, and nonprofits to achieve success focusing on these key areas:

• **Health Equity:** Fostering culturally competent health care services and more healthcare policies to close health disparities for Black and brown Americans.

• **Criminal Justice Reform:** Providing mentorship and therapeutic programming as off-ramp from the criminal justice system and building long-term neighborhood supports.

• **Education Equity:** Guaranteeing every New York City school child can have equal access to academic success, college, career, and civic readiness

• **Workforce Development & Small Business Support:** Ensuring more small business owners have access to technical assistance, capital, and mentorship.

• **Combatting Hunger:** Ensuring emergency food providers have resources, skills, and capacity to achieve/maintain operational excellence, adopt and become more resilient organizations provide food and some level of benefits access.

• **Corporate Volunteerism:** Transforming the corporate volunteerism model to a model based on equity with comprehensive orientation and training on implicit bias and the specific needs and concerns of Black and brown communities.

Learn more!

Key Takeaway: UWNYC focuses on the key areas of health equity, criminal justice reform, education equity, workforce development & small business support, combating hunger, and volunteerism.
Did you know?

• 2 in 5 New Yorkers you pass on the street can’t afford to cover the basics—housing, food, childcare, taxes, transportation, and healthcare.

• 84% of all NYC households who can’t cover the basics have at least one working adult.

• Nearly 3 million New Yorkers can’t afford healthy foods, and 1.3 million rely on soup kitchens and food pantries.

• UWNYC reaches 1 million low-income New Yorkers each year.

• UWNYC works with over 300 corporations, 600 nonprofit organizations and government agencies, and 20,000 individual donors and volunteers.

For more information about the challenges facing our community, read our report on economic mobility, Overlooked and Undercounted 2021: Struggling to Make Ends Meet and visit our NYC Demographic Dashboard.
Impact in Action

During the pandemic, United Way of New York City raised more than $17 million and received more than $275,000 in in-kind services. This money funded more than 300 community-based organizations fueled by the investments of more than 1,270 individual donors, 45 institutions, and 31 longstanding corporate partnerships.

We also:

1. Received $10.9 million in federal awards from HRSA (Health Resources & Services Administration) for our Choose Healthy Life program that imbeds public health workers into Black churches to address COVID-19 and long-standing health disparities.

2. Became a member of the Clinton Global Initiative’s Action Network to address racial and economic disparities.

3. Developed the Food Assistance Collaborative (FAC) between philanthropy and public agencies to increase coordination, equity, and efficiency in emergency food distribution.

4. Designed the original cohort that imbedded a human services agency in underserved public schools later becoming the DOE’s model for more than 200 Community Schools.

To read more about how UWNYC responded to the COVID-19 crisis, here.
FAQ

**What does United Way of New York City do?**

We are a nonprofit organization based in New York City that works in the poorest communities to ensure that no New Yorker is ever one paycheck away from hunger and homelessness. We work to create a city in which children and families can dare to dream and build a future for themselves. Because when everyone has a chance to succeed, our city succeeds, too.

**Why should someone donate to United Way of New York City?**

To drive lasting change in our City, UWNYC looks at the whole picture and deploys a comprehensive strategy for impact that goes beyond islands of success. Donating to (as well as through) UWNYC supports coordinated action and lasting solutions.

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**Key Takeaway:**

UWNYC is a nonprofit that convenes cross-sector partners to facilitate equitable change for the economic mobility of low-income New Yorkers.
How is United Way of New York City different from other charities?

To be a voice for our most-vulnerable neighbors and help them achieve self-sufficiency, United Way of New York City (UWNYC) brings changemakers to the table to create and deliver strategies that work. We bring corporate, government, foundation and nonprofit partners together to carry out our collective impact approach known as the 5Ds.

The 5Ds provide the infrastructure for stakeholders to:

- **DEFINE** - We outline the problem and the solutions using an equity-focused Results Based Accountability model.
- **DIAGNOSE** - We identify the challenges and strengths of communities that hinder and promote self-sufficiency.
- **DESIGN** - We develop accountable plans to solve these challenges.
- **DEPLOY** - We activate the most effective resources to execute the plans.
- **DRIVE** - We leverage the achievements to impact on broader systems and policy change.

How does United Way work with agencies?

To address the complex challenges that New York City faces, we created a network of more than 550 Community Based Organizations (CBOs) to develop and deploy valuable, human-centric, and real-time solutions in neighborhoods across the city, course correct programs and services when necessary, and provide us with valuable feedback from beneficiaries.

How does UWNYC work with companies?

More than just a way to give back to the local community, UWNYC’s Social Impact Suite provides employers and employees with a customized engagement plan designed to retain and develop your employees, elevate your brand and client relationships, and provide an immeasurable impact on the NYC community. For a list of our corporate partners, click here. To learn more about the benefits of partnering with UWNYC, click here.

What is UWNYC’s overhead?

UWNYC’s operating expenses or “overhead” is 20% of total revenue. This is competitive with the top nonprofits in the U.S. and is well below the industry standard and recommendations from the Better Business Bureau Wise Giving Alliance and Charity Navigator. UWNYC keeps a close eye on expenses, while making sure we have the talent, expertise and systems to raise and invest resources for maximum impact.

Where can I find additional resources to learn about UWNYC’s work and impact?

The best place to learn more is our website, which can be found at unitedwaynyc.org. You may want to review our Corporate Partners and Tocqueville Society pages especially.

Our YouTube channel has video resources and success stories. You can find our most recent Annual and Impact reports here.
Overview
Partnering with UWNYC not only provides groups with a seat at the table for collective impact work, but also offers a variety of ways to achieve business and corporate social responsibility (CSR) goals.

About the Volunteer Experience
UWNYC’s volunteer engagement program is designed to provide opportunities that invite participation in activities that encourage critical reflection and lead to a transformation in perspective to achieve change that can influence the volunteer’s role as a member of their company/organization and as a community member.

As part of our Equity Learning Journey, volunteers will become “change agents” and “problem solvers” equipped to educate, raise awareness, shift mindsets, beliefs, and behaviors toward a group of people or community to expose misconceptions about poverty in New York City.

Key Takeaway:
UWNYC Volunteers become change agents working to shift the narrative about poverty in New York City.
Our engagement networks and affinity groups (Tocqueville Society, Women United, and Young Leaders Council) are communities of New Yorkers who come together to make a difference.

**The Tocqueville Society**

The Tocqueville Society recognizes local philanthropists who are committed to social change through outstanding community service and financial support. Today, there are nearly 400 Tocqueville Societies in the United States, Europe, and elsewhere which collectively raised more than $514 million from over 25,000 individuals. There are nearly 500 million dollar roundtable members in addition to over 470 families who have endowed their annual Tocqueville support through a planned gift.

**Women United**

Women United is a network of vibrant, diverse female professionals who value the power of community, aspire to be part of something bigger than themselves, and believe in making smart investments personally, professionally, and philanthropically. These talented women advocate, fundraise and volunteer with UWNYC to improve the lives of New York City’s children and families and get them on the path to leading self-sufficient lives. Founded in 2002, Women United has over 75,000 members internationally, representing 174 communities in six countries worldwide. Globally Women United has raised over $1.5 billion dollars since its inception.

**Young Leaders Council**

The Young Leaders Council (YLC) brings the passion and philanthropic power of young professionals together to transform New York City. The YLC provides robust opportunities to connect community-driven 20- and 30-somethings who are eager to lead their peers, fundraise and advocate on behalf of low-income New Yorkers.
# TOP SUPPORTERS

## Corporations
- American Express
- BMO Capital Markets
- Brown Brothers Harriman
- Hearst
- National Grid
- Wells Fargo
- AARP Foundation
- City University of New York
- JPMorgan Chase & Co.
- TD Bank
- UPS

## Foundations
- Bank of America
- Clinton Global Initiative – Clinton Foundation
- Colgate-Palmolive
- Credit Suisse
- Americas Foundation
- Gates Foundation
- Helmsley Charitable Trust
- Macy's
- Wells Fargo Foundation
BOARD OF DIRECTORS

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Vice Chair, Vice Chairman  
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Andrew Bregenzer  
Regional President, Metro New York  
TD Bank, America’s Most Convenient Bank

Ken Bronfin  
Senior Managing Director  
Hearst Ventures

Evelyn Castillo  
Consumer Banking Region Executive, Manhattan/Northern New York City  
Bank of America

Steven Choi  
Executive Director  
One for Democracy

Bernice A. Clark  
Chief Marketing Officer  
NYC Economic Development Corporation

Hedieh Fakhriyazdi  
Director, Social Responsibility and Weil Foundation  
Weil, Gotshal & Manges LLP

Robert L. Friedman  
Senior Advisor  
Blackstone

Tracey Gaven-Bridgman  
Vice President of Operations, NYM  
Starbucks Coffee Company

Dipti S. Gulati  
Partner, AERS  
Deloitte & Touche LLP

Kathryn Kaminsky  
Vice Chair – Tax Leader  
PricewaterhouseCoopers LLP

Evan Kaufman  
Principal Global Impact  
KKR

Elly Keinan  
Group President  
Kyndryl

Randall Kessler  
Sr. Managing Director  
The Blackstone Group

Larry Klane  
Co-Founder  
Pivot Investment Partners

Lorraine M. Lynch  
Global Vice President, Transformation Office  
National Grid

Joshua B. Mason  
Managing Director, Portfolio Manager and Strategy Head for CMBS – New York  
Ares Management Corporation

Neil Masterson  
Chief Executive Officer  
OneWeb

Felix V. Matos Rodriguez, Ph.D.  
Chancellor  
City University of New York

Anish Melwani  
Chairman and CEO  
LVMH Moët Hennessy Louis Vuitton Inc.

Ted Moudis  
AIA, Senior Principal  
Ted Moudis Associates

Robert W. Mullen  
Chief Executive Officer  
Structure Tone

Paul Papas  
Global Managing Partner | Cognitive Process Transformation and Digital Strategy & IX  
IBM Corporation

Jennifer Piepszak  
Chief Financial Officer  
JPMorgan Chase & Co.

Brad A. Rothbaum  
Managing Director Head, US Trading Products  
Chief Operating Officer  
BMO Capital Markets

Todd Schwartz  
Managing Principal, New York  
Cushman & Wakefield

Amani Toomer  
New York Giants Alumni

David HW Turner  
Chief Financial Officer and Montvale Office Managing Principal  
KPMG LLP

Karyn L. Twaronite  
Partner, Global Diversity & Inclusiveness Officer  
Ernst & Young LLP

Jennifer Warren  
Robyn Zivic  
Managing Director, Head of FSG NY Sales and Global Commodities Distribution  
CIBC World Markets Corp

Staff Contact List

Gina Caputo  
gcaputo@uwnyc.org

Erica Cajamarca  
ecaajamarca@uwnyc.org

Raquel DaSilva  
rdasilva@uwnyc.org