



United Way International
Local Impact on a Global Scale
2007-2008

*Helping build community capacity for a better quality of life worldwide through
voluntary giving and action*

Table of Contents

- 3.....What is United Way International?
Who we are, what we do, and how we do it
- 4.....Global Network
Reaching out to local communities worldwide
- 11.....The Road Ahead
Mobilizing resources to ensure long-term, positive impact
- 12.....Donor Acknowledgements
- 19.....UWI Board of Directors
- 20.....UWI Staff

What is United Way International?

United Way International (UWI) is a global network of locally-governed organizations operating in 46 countries and territories. Global members work to address human needs and create long-term, sustainable solutions at the community level.

Relying on support from donors, the network makes a positive impact worldwide by distributing money, goods, and volunteer services to local projects and charitable organizations. Members also work closely with companies, labor, foundations, and government to help craft their philanthropic strategies.

UWI strives to develop a culture encouraging volunteer governance and professional leadership at the international, regional, and local level. This is accomplished by bringing together leaders from diverse fields – corporate, government, non-profit, education, and more – to identify and solve issues facing individual communities.

Global Network

Reaching out to local communities worldwide

UWI relies on a global network of dedicated volunteers and staff to accomplish its mission. With more than US \$1 billion generated by this network, thousands of lives have been improved through the work of UWI and its members.

Growth Areas

United Way continues to grow and develop local capacity in nearly 50 countries and territories around the world. Following are highlights from China and India, as well as initiatives to expand major gifts strategies and assist donors in their international giving objectives. In addition, reports on disaster relief projects and regional meetings tell the story of our global network and its continual development.

China

The growth plan in China aims to strengthen the existing system of more than 260 local United Way organizations.

In December 2007, UWI conducted its first training for more than 300 local staff and volunteers from the China Charity Federation (CCF), UWI's member in China. Training focused on the introduction of membership requirements, global standards, community impact, governance, and resource mobilization.

Six additional training sessions in China are planned over the next three years, highlighting specific areas of United Way's external and internal operations. These sessions will provide specific non-profit management development, including internal management and financial transparency, identification of focus areas, and community engagement. Additional training will address volunteer recruitment, retention, and recognition, along with other skill sets critical to a United Way affiliate's success.

India Expansion Initiative

In late 2006, the UWI Board of Directors made expansion of United Ways in India a priority. As centers of economic strength and rapid growth, eleven cities were identified for the initial expansion plan, with Bangalore, Delhi/National Capital region (NCR), and Hubli-Dharwad the focus of efforts in 2007.

With a generous gift from the Principal Group, CEO Barry Griswell, and his wife Michelle, the India Expansion Initiative received a major impetus. Staff was hired to raise funds in North America and develop new United Way affiliates across India. To

execute ground-level operations, a consultant with United Way experience was hired in Mumbai.

In 2007, UWI raised a total of \$1.18 million for expansion efforts in India, surpassing the initial goal of \$1 million.

As a strategy to engage individuals and employees in the United States, the United Way Friends of India program was created. This program was launched on the UWI website on August 15, 2007, celebrating India's 60th Independence Day. The web page offers the option to contribute, send feedback, and volunteer with the programs supported by the India Expansion Initiative.

Teresa Hall Bartels, President and CEO of United Way International, and Brian Gallagher, President and CEO of United Way of America, visited India in November 2007. They announced the establishment of United Way Delhi and presented the mission of United Way to business leaders based in the National Capital Region (NCR). As a result of this event, several corporate executives and local business leaders came forward to volunteer for the United Way Delhi.

UWI staff provided training for United Way board members in Bangalore, Delhi/NCR, and Hubli-Dharwad. The training covered topics such as the mission of United Way, membership requirements, the United Way global network, board member roles and responsibilities, work plans for the first years of a United Way affiliate, and legal requirements for operating in India.

Since the initial training, follow up meetings with each affiliate's Board of Directors have been conducted. Pro-bono and in-kind support for auditing, executive search assistance, legal registration, office space, and website development has been identified. Phase 1 of the expansion in India is nearing completion, and United Way affiliates in Bangalore, Delhi/NCR, and Hubli-Dharwad plan to complete the official registration process by May 2008.

Additionally, UWI staff met with community leaders in Chennai and Kolkata, United Way's next priority cities. To further strengthen United Way's presence, UWI staff held meetings with US Consular Generals in both cities, where they received positive feedback on efforts to address charitable needs and obtain tangible support for the launch of new United Way affiliates.

United Way International also became a member of the US-India Business Council (USIBC). As the only charity represented on this institution's membership, UWI continues to build relationships with multinational companies while serving as the corporate responsibility partner for outreach programs in India.

Future plans include the start up of five new affiliates in 2009, along with additional expansion to strategic locations in the years to come.

Major Gifts Expansion Initiative

Created to help spread the culture of individual philanthropy, the Major Gifts Expansion Initiative increases self sufficiency in local communities by fostering philanthropic giving and volunteerism worldwide.

In 2007, the Major Gifts Expansion Initiative, with members of the World Leaders Council, made on-site visits to Colombia, Jamaica, and South Africa.

In Colombia, Paula Mathis, UWA Million Dollar Roundtable member from Orange County, California, discussed motivations for giving. As a result of this visit, programs were initiated in two key cities, and UWI member Dividendo por Colombia secured seven new major gifts. New programs were expected to contribute to a 30% increase in giving for 2007.

Bob Gwyn, former United Way of America National Tocqueville Chair and Million Dollar Roundtable member from Edwards, Colorado, traveled to Kingston, where the American Friends of Jamaica offered a US \$50,000 grant for the Major Gifts program.

Larry Macdonald, Chairman and CEO of Calgary-based Point Energy, Ltd. And Million Dollar Roundtable member from Calgary, Alberta, Canada, travelled to Cape Town to discuss the Major Gifts Expansion Initiative in South Africa. Mr. Macdonald shared success stories and peer-to-peer strategies for improving lives, while promoting a high net worth giving effort.

In addition to on-site consultation and mentoring, best practice and knowledge exchange programs were created with the launch of the Major Gifts learning portal. This allows visitors to access via the internet current information pertinent to major giving. Similar to a blog site, members interact with one another on a regular basis in search of ongoing learning opportunities geared towards creating successful Major Gifts programs.

International Donor Advised Giving

The International Donor Advised Giving (IDAG) Program meets donors' philanthropic goals by ensuring donations get to reputable non-profit organizations in the most timely and effective way possible.

The donation process is fairly straightforward. A company, foundation, or individual making a gift recommends UWI use the funds for charitable purposes in a particular country, region, or field of interest. Funds may also be recommended for the support of a particular organization outside the United States.

Once a recommendation is made, the IDAG team works directly with potential grantee organizations. With the assistance of UWI's international network of affiliates and partners, IDAG evaluates the grant recipient, exercising appropriate discretion, control, and oversight as required by United States law.

Grantee organizations are required to sign a written grant agreement promising to comply with the requirements as specified by UWI. Donors are kept informed throughout the process, ensuring funds are used according to the donor's initial recommendation.

In 2007, IDAG distributed more than US \$30 million in grants benefitting local communities in more than 85 countries and territories. More than 900 grants were vetted according to United States laws governing international giving. UWI's due-diligence process continued to reflect the highest levels of global standards, transparency, and accountability.

Grants covered a wide range of impact areas, including education, environment, health, disease prevention, and financial stability.

2007 List of Contributors to Donor Advised Giving

ADC Foundation	McKinsey & Company
Agilent Technologies	Mr. Tim McMains
Altria Group, Inc.	Medtronic Foundation
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Disaster Relief

United Way International plays a critical role in assisting communities with long-term disaster relief efforts.

In 2007, UWI created a Hurricane Disaster Recovery Fund, which could be made available quickly in response to disaster situations, and a long-term recovery fund to assist areas affected by earthquakes in Peru.

UWI also continued its commitment to serving communities affected by the 2004 Indian Ocean tsunami. Southeast Asia Tsunami Funds in the amount of US \$1.6 million were distributed to advance the following long-term, community-based projects:

- Creation of a Health Education and Malaria Prevention Center on Nias Island.
- Creation and operation of a mobile library on Nias Island.
- School construction in Aceh and Nias Island, Indonesia, and Chinnakudi, India.
- School expenses for 31 orphans in Tadong, Gangtok and Sikkim, India.
- Completion of community centers in Tharangambadi, India, and Phang-Nga province, Thailand.
- Construction of more than 270 new homes in Poempuhar, India

The Tsunami Fund was created through the generous contributions of LG Electronics, the National Football League (NFL), Samsung, and hundreds of individual donors.

Regional Meetings

United Way International's network of affiliates meets annually to build relationships, discuss complex issues, and enhance the overall approach towards achieving sustainable community impact.

In 2007, more than 650 volunteers and professionals attended regional meetings in the following locations:

- Brussels, Belgium (European Region)
- Mexico City, Mexico (Latin America)
- Seoul, Korea (Asia-Pacific)
- Accra, Ghana (Africa)
- Basseterre, St. Kitt's and Nevis (Caribbean)

Orientation and training focused on developing skills in Community Impact, Resource Mobilization, Accountability, Transparency and Major Gifts strategies.

These core focus areas are derived from the highest-priority Global Standards, introduced in 2006.

Regional meetings also introduced the Global Enterprise Initiative, engaging affiliates in the creation of a strong, global network of members with both rights and responsibilities within the worldwide network. This initiative will provide greater consistency of the UW experience as members commit to provide service consistent with the mission of United Way and the Global Standards.

Representatives from South Africa, Uganda, Nigeria, Kenya, and Ghana attended the second annual **Africa Regional Meeting**. Each representative emphasized the benefits of collaborating to address issues specific to the continent's local communities. Participants were provided the honor of hearing from Ghana's traditional leaders on the impact of historical leadership in human development.

At the sixth annual **Latin America Regional Meeting**, representatives discussed United Way's evolution in the region during the last five years. In preparation for 2008-09, participants shared thoughts on how to best take advantage of opportunities presented by the new global entity, identify priorities for the transition phase, and enhance communication between affiliates in the region.

Participants at the 2007 **Caribbean Regional Meeting** expressed a common desire to strengthen the region's nonprofit sector. Members planned to assist communities by building professionalism and developing a more strategic way of doing business among registered nonprofits in the Caribbean. A Caribbean Advisory Committee is now in formation, which continues to unify charitable work in the region.

More than 150 representatives from member organizations participated in the fifth **Asia/Pacific Regional Conference** in Seoul, Korea. Attendees learned how the new global entity will provide additional capacity for learning and utilize technology to help strengthen organizations. Members also discussed development and identification of projects that will continue to address the region's most critical needs.

The **European Regional Meeting** aimed to strengthen the network among member organizations in Europe and the Middle East. Participants shared progress and achievements, discussed global standards and membership requirements, and learned about best practices of community involvement. The meeting produced an improved understanding of member's roles in creating strong, efficient, community-oriented impact.

Additional Accomplishments in 2007

United Way International facilitated engagement of the first National Executive Director for United Way of Australia. Using United Way International's Global

Standards, orientation to the Global Enterprise and training in Community Impact was provided for more than 35 volunteers representing 10 United Way affiliates in Australia.

To assist victims of brutal snowstorms across Southern China, United Way member China Charity Federation (CCF) initiated disaster-relief activities and began accepting donations from the public. On February 2, 2008 CCF held an evening performance to raise public awareness of relief initiatives. More than 100 famous stars and celebrities attended, and 34 million RMB Yuan (about US\$4.7 million) was raised.

2008 marks the 20th anniversary of United Way Mauritius. A meeting with the US Ambassador and his senior staff resulted in their commitment to support United Way with resources and connections to new donors. A major business location for multinational corporations, Mauritius will continue to provide a strong platform for United Way's outreach and activities.

Funding was secured to start the Alexis de Tocqueville Foundation/United Way in Paris, France with an expected launch in 2008. Meetings taking place in France will address strategic planning for the Foundation and the United Way Regional Office (Europe).

A six-point plan was introduced to expand the services of the Community Chests of South Africa, the country's national organization, and to initiate work in Johannesburg through the efforts of the Community Chest of the Vaal Region.

Initial start-up efforts resulted in registration of Caminando Juntos, a new United Way member in Argentina.

The Road Ahead

Mobilizing resources to ensure long-term, positive impact

Global Initiative

In March of 2008, United Way International's Board of Directors and United Way of America's Board of Trustees voted to integrate staff and resources, and create a global United Way system by 2009.

The global United Way will continue to enhance and deliver services of value to its donors and members. In addition to previously mentioned initiatives, UW is working to:

- Create successful United Way affiliates in eight Indian cities; Johannesburg, South Africa; and St. Kitts and Nevis.
- Expand United Way's regional capacity in Africa, China, and western Europe
- Expand the International Donor Advised Giving Program (IDAG)
- Develop local membership and national partnership agreements
- Assist with the start-up and launch of the Tocqueville Foundation/United Way in Paris
- Design and launch the Global Fellows Program to engage and support early career professionals from within the United Way network
- Provide training for local communities interested in starting Major Gifts programs

During the transition to a global entity, United Way International will continue to operate with superior transparency and accountability. This ensures compliance with United States laws governing international grant-making, including the completion of on-time and accurate financial reports, distribution of grants, and management of international support funds.

Donor Acknowledgments 2007 – Annual Campaign

Corporations and Corporate Foundations

\$100,000 or more

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Special Contributions to the Asia Development Fund \$500,000

LG Electronics

* In-kind contribution

Major Gift Expansion Initiative Donors 2007

UWI is grateful to the following donors for their generous investments in the Major Gifts Expansion Initiative. These gifts are pledges for multi-year contributions.

\$250,000 or more

The Annenberg Foundation
Philadelphia, Pennsylvania

Bill and Melinda Gates Foundation
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\$100,000 - \$249,000

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\$50,000 - \$99,999

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If we have inadvertently omitted any donor, please contact us. We apologize for the oversight.

Alexis de Tocqueville Society

Ordre d'Egalite: \$50,000 to \$74,999

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United Way International is grateful to the following United Ways in the United States and Canada for their generous contributions.

\$50,000 or more

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United Way of Central New Mexico
United Way of Central Ohio
United Way of Metropolitan Atlanta
United Way of Rhode Island
United Way of Westmoreland County
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\$2,500 to \$4,999

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United Way of the Greater Lehigh
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India Expansion Initiative Donors 2007

UWI is grateful to the following donors for their multi-year and outright gifts to the United Way India Expansion Initiative.

\$250,000 or more

LG Electronics
Murthy Law Firm
Phil Swift

\$100,000-\$249,999

The Principal Group
J. Barry and Michelle I. Griswell

\$50,000-\$99,999

The Deshpande Foundation
Sunil and Nita Wadhvani

\$1,000-\$49,999

FedEx
Kapil Kumria
Jayesh and Mona Parekh
Roma Kapoor

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Acknowledgments

There are many individuals who volunteer their time, talent, and treasure in support of United Way International's mission. These individuals make a real difference in the lives of people around the world. To our volunteers we would like to say a special thank you. We simply could not achieve high-quality results without your commitment and dedication!

A special thanks to the members of the Donor Support and Development Committee whose guidance and leadership have been instrumental in creating successful resource development strategies:

Robert Boucher

Barbara Gattorn, Division Chair, Corporate & Foundation Giving

Ted Garrard, Chair, Annual Campaign

Joe Howard, Division Chair, Individual Giving & Direct Mail

Larry Macdonald, Chair, Donor Support and Development Committee

Ruth Maldonado

Bill Matassoni, Immediate Past Committee Chair

Barbara Stonebraker, Division Chair, U.S. United Way Engagement

Ramón Sosa Mirabal

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