



## INSTRUMENTAL IN CHANGE

The Pittsburgh Foundation

ANNUAL REPORT 2005

O U R M I S S I O N S T A T E M E N T

**T**he Pittsburgh Foundation works to improve the quality of life in the Pittsburgh region by evaluating and addressing community issues, promoting responsible philanthropy, and connecting donors to the critical needs of the community.



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## from the chairman and president

George A. Davidson and William E. Trueheart

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# mark ROOSEVELT

## and Pittsburgh Public Schools Q&A

MARK ROOSEVELT became Superintendent of the Pittsburgh Public Schools in August. He was the co-author of sweeping educational reforms in Massachusetts, where he served as a state legislator from 1986-1994. For four years, he was House chairman of the Joint Committee on Education there, and in 1994, Roosevelt was the Democratic nominee for Massachusetts Governor. Before coming to Pittsburgh, he was Managing Director of the Massachusetts Business Alliance for Education. He had earlier served as President and CEO of the Massachusetts Biomedical Initiatives. He has an undergraduate and a Law degree from Harvard University. He is the great grandson of Theodore Roosevelt. A graduate of the Broad Superintendents Academy, Roosevelt and the School Board want to significantly improve educational quality and bring financial and operational efficiency to the Pittsburgh Public Schools. In March, the school board voted 6-3 to approve his plan. It calls for closing 22 elementary and middle schools at the end of the school year; expanding 10 elementary schools into K-8 schools and turning eight low-performing schools into more challenging “accelerated learning academies.”

**Q.** Has the effort to bring change to the schools been what you expected?

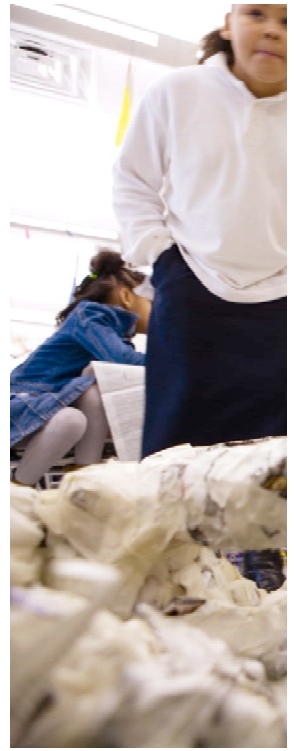
**A.** I underestimated the size of the task of doing the school closings. In a certain sense, it's unfortunate that the first thing I had to do was close schools. It's a hard way to start a relationship, with a painful event for parents. I've gone to well over 50 public meetings where 90 percent of the conversation is “Why are you closing our schools?” The positive side is it probably makes it very clear that we mean business. It's also given us an opportunity for a new model for doing business — letting issues of achievement drive decision making. That gives a preview of how we're going to do everything. And creating eight new schools might have been more difficult to accomplish outside of the context of right-sizing.

**Q.** What do you want to accomplish?

**A.** Numbers one through ten are to raise student achievement. At all levels. Kids at the lower end of the achievement scale — that's a dire need. But there's also a great need to raise the achievement of the kids of whom the perception is they're doing quite well.



Pittsburgh Public Schools Superintendent Mark Roosevelt talks about his goals for improving the district. On pages 6-9, see photographs of students at Taylor Allderdice High School, Helen S. Faison Arts Academy and Schiller Classical Academy. The Pittsburgh Foundation thanks the schools, administrators and students for participating.



**Q.** How do you do that?

**A.** It is all about “rigor.” And setting expectations. The Broad Foundation sent four of the best superintendents in the country to go over our curriculum, our organizational structure and what should be in a comprehensive reform agenda. Our curriculum is not rigorous enough. And a big piece is professional development for our teachers and principals. Currently, for teachers, it is not cohesive or coherent or sufficiently part of a larger academic plan. For principals, we don't have any professional development. It is essential we act on these two things at once — a new curriculum and professional development.

And in addition to improving the curriculum and professional development, we're looking at assessment, so that teachers can see what's working and whether students are learning. We're going to create a

structure so that teachers know which students are falling behind and can get help to those children - quickly. So that for example an elementary math teacher sees which kids learned fractions, which didn't and how to respond to that.

The larger, more complicated and vaguer issue is cultural change. Probably the most important part is being customer friendly. We're not. We need to make this district customer friendly in part so that we can attract more kids. The best way to do that is to offer parents and students the kind of school that they need. But we also have to convince our own employees that the district and therefore their jobs will not survive without it. We've been losing kids to the private and parochial schools or families moving to the suburbs. Now even folks who cannot move have a method to pull out too — the charter schools. Being customer friendly and having academic rigor — if we have those two things, people will choose us.



We also want to establish a performance-based culture where promotions are based on performance, not whom you know. It's hard, but there does come a tipping point, and we have to get there relatively fast because there's enormous urgency to it. We're failing kids in large numbers, and we're in an economy that's cruel to undereducated people.

**Q. What are the changes you need to make in order to succeed?**

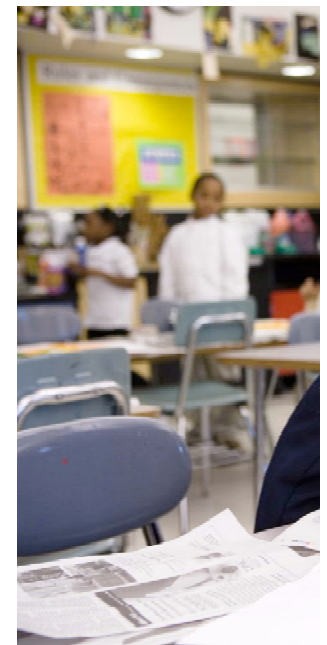
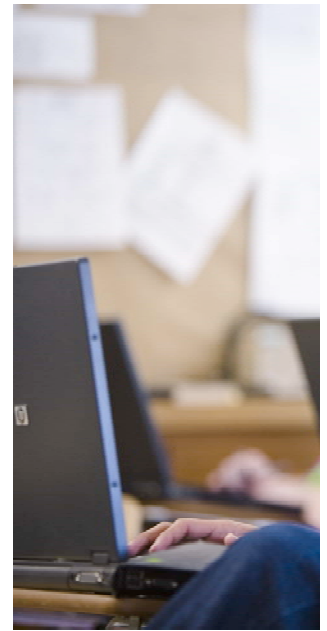
**A.** We have to change the central office to being in service to the needs of schools. It sounds obvious. But central offices can become focused on other demands, such as compliance. But the appropriate role for central office is to help schools. If it doesn't improve the instruction and the interaction between the teacher and student, does it really matter? There are some really good principals and teachers, and if they're given the support they need, they can take us to another level.

**Q. How did you get the work done to make a comprehensive school realignment plan come together in such a short time?**

**A.** Well, for one, we had Rand come in and help. We said "Heck, if we're going to close schools, why not close the underperforming schools?" All the schools with the lowest ratings from Rand's rich and sophisticated school performance analysis are either being closed or reconstituted into accelerated learning academies.

**Q. What support will you need to make all this happen?**

**A.** Change, as complicated and demanding as we're going to be asking, needs a lot of external support at a variety of levels. Foundations are coming forward to help financially. But you also need a great deal



of political, social and cultural support of the change required. People have to get behind it and be willing to be loud about it. Most importantly — Pittsburghers need to raise the issue of improving student achievement for all of our children to the very top of the city's agenda.

**Q.** How will you tell if the plan is working?

**A.** My contract is for three years. I believe there will be discernable signs of improvement in three years. There will be benchmarks along the way to see if we're making progress. I am committed to evaluating - with hard student achievement data - all that we are doing.

**Q.** Have you ever faced a challenge like this?

**A.** In many ways the work that needs to be done in Pittsburgh is

eerily similar to what we faced in passing the comprehensive Education Reform Act of 1993 in the Massachusetts State Legislature. Here in Pittsburgh I am convinced that many of the key ingredients are in place. The School Board is ready for change, and the external community — the universities, the foundations, the media — is desperate for something to move things forward.

We are a district with 32,000 kids — that is a very manageable size. That doesn't mean that there aren't obstacles, but a lot of the obstacles other cities face — for example, large numbers of children for whom English is a second language - we don't have. A great many of the pieces are in place. Now it is up to the Pittsburgh community to decide if they are willing to support the changes that are necessary to make this happen, and, most importantly, it is up to us who work for the schools to make it work in the schools every single day.



## ESTABLISHING A FUND | what it entails

Since 1945, The Pittsburgh Foundation has been connecting its generous donors with the critical needs of our community. Donors who have established funds through the Foundation can support virtually any area of charitable interest in Pittsburgh, or anywhere in the United States. Because the Foundation is a public charity, donors benefit from significant tax advantages.

Endowment funds held by the Foundation range from \$10,000 to \$40 million, created by individuals and organizations with a passion for Pittsburgh and a deep

commitment to their community. More than 1,000 individuals, families and organizations have established funds at The Pittsburgh Foundation, which exist in perpetuity — growing each year — to provide an ever-increasing resource to benefit the community.

In 2005, the Foundation awarded approximately \$27 million in grants to a vast array of nonprofit organizations, students through scholarships, and medical researchers, based on donor interests and specific purposes of individual funds.

### OUR PURPOSE

Throughout its history, The Pittsburgh Foundation has sought to meet the changing needs of our region. Our purpose is to focus on the people of our community through engaged grant making and strategic partnerships with other organizations.

### WE HAVE THE EXPERTISE

The development and donor services staff of The Pittsburgh Foundation have the experience and the expertise to assist donors in establishing funds and to structure each fund to realize the important tax savings that result from charitable giving. Our experienced grantmaking staff has broad knowledge and understanding of the needs of the community and can assist donors in ensuring that their charitable goals are met.

*All distributions from donor-advised funds are subject to the ultimate control and variance powers of the Board of Directors of The Pittsburgh Foundation.*

## who are our DONORS?

We provide grants to a wide arena of educational, social service, economic development, health-related and cultural organizations. Current unrestricted grant making (from the “Community Fund”) is made in five Targeted Areas for Impact: achieving educational excellence; supporting families, children and youth; fostering economic development; reducing disparities in health outcomes; and advancing the arts. We believe a targeted approach to philanthropy can have a greater positive impact on our community.

The following donors are featured in this year’s annual report:

MAX STARKS [education]

LESLIE BROCKETT-WOHLFARTH [arts]

LIGONIER VALLEY ENDOWMENT [economic development]

JOE AND CAROL MASSARO [families and youth]

LEO M. CASTAGNARI [health]

and our donor feature, TOM USHER



Max Starks' service to others began as a youngster in the Boys and Girls Club. Since joining the Steelers in 2004, he started a fund to focus on children's literacy and education.

## MAX STARKS

For Pittsburgh Steeler defensive tackle Max Starks, helping others began early. As a youngster in Orlando, Florida, he was a member of the Boys and Girls Club. And not long after, he went back to help the younger children. In ninth grade, he worked as a high school tutor to elementary school children. As a high school senior, he was one of eight to attend a national service learning conference. He returned and started a program to go into underprivileged elementary schools to tutor students for standardized testing. And then at the University of Florida, he worked with the Gator Literacy program, going into area schools promoting reading and learning.

So in October, when he started a fund with The Pittsburgh Foundation, it was a natural continuation. "People have given so much to me," he said while recuperating from knee surgery. "It was just the right thing to do. My mom and dad have always instilled that in me: service to others."

After joining the Steelers on draft day in 2004, Max started talking with family friend

and former Steeler great Dwight White, who mentioned The Pittsburgh Foundation. "I had expressed my desire to give back in western Pennsylvania, and Mr. White introduced me to Mr. Trueheart (President and CEO of the Foundation). We talked and came to the conclusion that it's something I really wanted to do and that I needed to do."

The Max Starks Fund focuses on children's literacy and education, and during this off-season, Max, 24, will set up the basic structure of the fund. "I've had a lot of different people approach me, and I'm pretty knowledgeable about the groups and the mentoring programs in the area. It's important for people in my position to speak up about these things. I want to give children the opportunities and the tools they might not otherwise have. I want them to have the same tools I had as a child."

The Pittsburgh Foundation is working with and advising Max. "They're a fantastic team and have incredible knowledge and advice," he said. "This is something I'm really looking forward to doing."



Leslie Brockett-Wohlfarth set up the Don Brockett Memorial Scholarship Fund in 1995 after the death of her famous actor husband. “And the funny part was that Don never had enormous respect for academia,” she said with a laugh. “But he did have it for kids who were trying so hard to learn in college while struggling financially.”

She sends out one appeal letter a year at Christmas time and usually gets between \$7,000 and \$9,000 in donations for the fund. Each year, she's able to give a student between \$5,000 and \$6,000 for their education expenses.

Leslie has given to students at the University of Pittsburgh, Carnegie Mellon University and Point Park University. She's leaning more toward Point Park because she gets a better response of applications, usually between six and 10.

“I have a group of friends who serve as the selection committee and they receive copies of the applications,” she said. “They go over them, and I ask for their choices.

The Pittsburgh Foundation answers all of my questions. I really am very, very fond of the people there. They take care of notifying the winner.

“And the kids are so appreciative. Often we get wonderful thank-you letters from these kids. It's very rewarding. As long as there's money there, we're going to continue. And The Pittsburgh Foundation invests very wisely, so it's growing. And that's wonderful to see.”

Don Brockett, whose many film credits include *Flashdance* and *Silence of the Lambs*, was well known as giving many young actors their start in his local shows.

“It's fascinating to see the success of some of these kids — Rob Marshall and his sister Kathleen — they both started with Don. And there are a lot of other performers without those identifiable names who have gone on to Broadway and the movies from their training with Don. That's why I think the scholarship fund is a good thing to remember Don by.”

Leslie Brockett-Wohlfarth, seen with an antique carousel pig she purchased with her late husband, sends out an appeal letter each year, collecting between \$7,000 and \$9,000. She then is able to help a local college student with education expenses.

**LESLIE  
BROCKETT-  
WOHLFARTH**



John Thorne, left, Kathy Etchen and Bill Stablein stand at Ligonier's volunteer fire house. The Ligonier Valley Endowment's goal is to enhance life within the Ligonier School District. The group makes grants usually between \$2,500 and \$10,000.

## LIGONIER VALLEY ENDOWMENT

The Ligonier Valley Endowment has existed for 30 years helping a variety of agencies that improve the overall quality of life in the boundary of the Ligonier School District. And as a community fund, it has 16 committed volunteers on its board of governors.

"We want to give back to the community for the benefit of the people and to enhance the quality of life in the Ligonier Valley," said Ryan Glista, president of the fund's governors. The group meets quarterly and recommends grants usually between \$2,500 and \$10,000.

"The grant requests are typically made for tangible items such as a piece of equipment, repairs or a special project." Funding for grants includes areas such as arts and humanities, civic organizations, education, recreation, and health and human services totaling over \$1.7 million.

It's been a great experience for Ryan, who is president of Smithfield State Bank just south of Uniontown.

"You read in the Bible that it's better to give than to receive, and it's a good feeling

to assist an organization with the funding of a special project." The group has worked on a capital campaign so that it can accommodate more requests. It's gaining in popularity and visibility with over \$3.4 million in assets.

"The Pittsburgh Foundation manages our endowment, and our donor services officer attends our quarterly meetings to advise and educate our members on the process," Ryan said. "They could do it all if we wanted them to, but we like to keep the personal touch."

The Ligonier Valley group handles the grant requests, which go through a screening committee, and then notifies the applicants whether requests have been rejected or approved. The Pittsburgh Foundation takes care of the disbursement.

"The Foundation has been very supportive and helpful. They handle all the administration, which is what allows us to remain an all-volunteer organization. For a small community, we're fortunate to have an organization such as the Ligonier Valley Endowment."



Joe and Carol Massaro both grew up in Pittsburgh, both with relatively modest origins. Joe's grandparents came from Italy with no education, and his father, the eldest of 12, had to leave school in seventh grade to support the family. With a strong family behind him, Joe graduated from University of Pittsburgh with an engineering degree. A few years later, he started a construction business.

"When Joe started his business, we were both very young and had no idea the business would grow to what it is today," Carol said, describing the origins of the Carol and Joe Massaro Family Fund. "It was all because we did business in Pittsburgh. So I think we owe something to Pittsburgh, and this is our way of giving back.

"We absolutely love the city. There are so many great things here, and I'm not sure that people realize how much we have -- the arts, sports, museums, organizations that help the poor. If you can support just one of them in your own way - it doesn't have to be money - it makes it a better city for all of us."

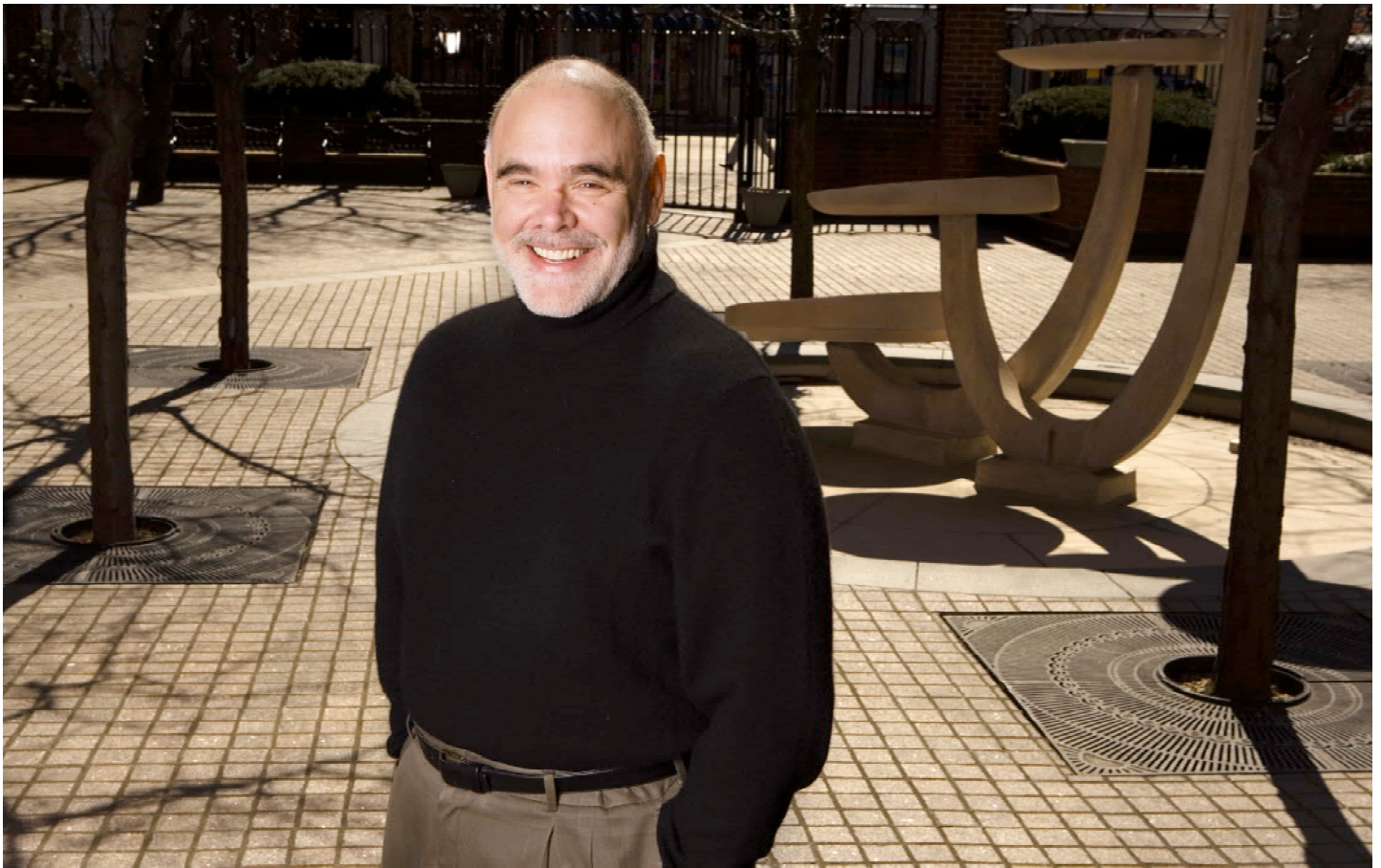
The Massaro family meets at the end of the year to discuss what they'd like to support. Joe and Carol of Oakmont and their children, Linda, Joe, David and Steven are on the boards of several local organizations, and so far, the grants from their fund have been directed to many of those groups, including the City Theatre Company, Neighborhood Academy, Pittsburgh Public Theater, The Union Project, Youthworks, Little Sisters of the Poor and Oakland Catholic High School.

Joe has a great deal of respect for local businessman Alvin Rogal, and when the two had lunch a few years ago, Rogal suggested Joe consider The Pittsburgh Foundation. That led to a meeting with Foundation President Bill Trueheart.

"You could have your own foundation, and we thought about that for about five seconds," Joe said. "The Pittsburgh Foundation does everything the way it's supposed to be done. I feel very comfortable having The Pittsburgh Foundation handle our interests. It's been a wonderful experience for us and the kids."

Joe and Carol Massaro of Oakmont created their fund as a way to give back to Pittsburgh's great resources.

JOE  
AND CAROL  
MASSARO



Leo Castagnari stands in the Heinz Hall courtyard, which his father, a bricklayer, helped build. His family fund was started out of a desire to continue his parents' legacy of giving.

## LEO M. CASTAGNARI

Giving back to his community is a principle that Leo Castagnari has held dear since his childhood. His father was a bricklayer, and his mother worked as a waitress “so it wasn’t really about giving money – it was about giving time.”

With parents who instilled in him the importance of helping others, Leo has tried to “give back” through the volunteer and financial support of a variety of human service agencies in the region. Since establishing the Castagnari Family Charitable Fund at The Pittsburgh Foundation in October 2002, he has continued to give time, as well as financial support, to each of the organizations supported by his family’s fund.

Leo chose to create his fund when his mother became ill. “I wanted to create a legacy to honor my parents, and I wanted to do so while my mother was still alive,” said Leo. “It was gratifying for me, and I think mom was proud.”

Among the organizations supported by Leo and the Castagnari Family Charitable Fund through time or grants are Gilda’s Club of Western Pa., the Women’s Center and

Shelter, Shepherd Wellness Community, Leadership Pittsburgh, the American Cancer Society, and Make-A-Wish Foundation. Leo serves on Leadership Pittsburgh, has taped boxes at the Food Bank, helped Persad with fundraising and has undertaken strategic planning with The Good Grief Center.

One especially important grant Leo recommended was given through the American Cancer Society. “It’s called The New You program,” explained Leo. “Women in commercial real estate got together and started it. They decided to hand sew “Satchels of Caring” for women undergoing chemotherapy.” The satchels include things such as a turban, a journal, and inspirational literature.

One of Leo’s favorite sayings is: “Much is required from those to whom much has been given.” It helped lead him to The Pittsburgh Foundation.

“I am so happy and proud to be a member of The Pittsburgh Foundation family,” he said. Leo is a member of the Foundation’s Inside Story Committee which identifies local non-profits for site visits, giving donors the opportunity to learn about charitable organizations.



Tom Usher was CEO of U.S. Steel until 2004 and plans long-term to give away most of what he's earned. He and his wife, Sandy, are starting a Christian camp for primarily inner-city kids.

Tom Usher is starting a new phase of life. The 63-year-old Oakmont resident retired in October of 2004 as CEO of U.S. Steel but remained as chairman until the end of January 2006. He remains the non-executive chairman of Marathon Oil Corporation.

At the end of 2003, he set up a fund with The Pittsburgh Foundation primarily because of tax advantages the mechanism allows. He already had established a private foundation but was only allowed to contribute up to 30 percent of his adjusted gross income with that vehicle. With a so-called "public foundation" set up through The Pittsburgh Foundation, he could contribute up to 50 percent of the adjusted gross income.

"2004 was a very good year for me," Tom said. "So I was able to put the 30 percent into the private foundation and the next 20 percent into The Pittsburgh Foundation fund." He did the same in 2005, and this year will be the first year that he makes disbursements from

The Pittsburgh Foundation fund.

"I basically started with a very middle-class life," Tom said. "I've got everything I want. If you gave me another \$100 million, I wouldn't live differently. My kids are well taken care of, but I want them to work. I don't want them to be idle rich. I think it's good for people to work. It's not good to retire at 25 or 40. And I intend to get them involved in the foundation to carry it on. My intention, long-term, is to give away most of what I've got." He and his wife, Sandy, have set up a screening mechanism with three criteria for possible grants. The organizations should be oriented towards Christianity, youth and western Pennsylvania. "Having said that," Tom added, "you don't necessarily have to hit all three."

The Ushers haven't decided where to make grants in 2006, but they do have one project that's in the works: a summer camp. "We bought some property up near Ligonier, and we're going to make it a Christian camp for primarily inner-city kids. I hope to use some of

the organizations I'm involved in — The Extra Mile Foundation and a few others — as a feeder network."

The camp will serve boys and girls eight to 12 years old, perhaps as many as 1,000 a summer. "I'm very concerned about the state of race relations in the last 20 years and I'd like to see a good, positive experience for these boys and girls. It'll be a gratis deal for the kids. We're hoping to be in business in the summer of 2007."

He moved to Pittsburgh in the ninth grade, and, as he said, "Pittsburgh is my home." The Pittsburgh Foundation Supporting Organization will be dedicated to activities around this region. "The Pittsburgh Foundation is structured so that it fits my needs well."

The Ushers plan to give away \$5 million to \$6 million a year, with the camp probably taking about 20 percent of the total. With the rest, he said, "Time will tell. We'll just have to see how it plays out."

# APPLYING FOR A GRANT | the process

The Pittsburgh Foundation comprises several types of funds that award grants in different ways. Our donors have created funds to support designated agencies; to provide scholarships to students who attend specific schools; and to advise on grants subject to the approval of the Foundation's Board of Directors.

The Foundation does not accept proposals for these funds. Other donors have established funds to support medical research, some of which come through a request for proposal process. The guidelines that follow are for grants from our Community funds, in our Targeted Areas for Impact.

## GRANTS ARE AWARDED IN THE FOLLOWING TARGETED AREAS FOR IMPACT:

### **Achieving Educational Excellence and Equity:**

Improving public schools' capacity to educate and improve students' outcomes.

### **Supporting Families, Children and Youth:**

Improving family self-sufficiency and supporting youth development.

### **Fostering Economic Development:**

Promoting upward mobility, and encouraging entrepreneurship.

### **Reducing Health Disparities:**

Increasing African American communities preparedness for eliminating urgent health disparities in Greater Pittsburgh communities and eliminating health disparities between African Americans and the majority population that have documented local urgency.

### **Advancing the Arts:**

Building the capacity of small- and mid-sized arts organizations, and encouraging arts outreach in all arts organizations.

### **Additional Grantmaking**

In addition to its grantmaking within its Targeted Areas of Impact, the Foundation also supports from its unrestricted pool the following:

- Emergency or unexpected critical needs or gaps in the community; and
- Donor preferences for charitable giving.

The Foundation also manages donor advised funds, which allow donors to recommend organizations to receive grants; designated funds which permit donors to identify specific nonprofit organizations to receive grants; together with scholarships and medical research funds.

## GRANTS ARE AWARDED FOR A VARIETY OF PURPOSES

- Organizational Capacity-Building
- Systemic Change
- Improved Service Delivery
- Planning and Program Development
- Community-Building

From time to time, the Foundation undertakes special initiatives that meet critical community needs and/or help our donors achieve their charitable goals.

## APPLICATION PROCESS

To request application guidelines, visit our Web site at [www.pittsburghfoundation.org](http://www.pittsburghfoundation.org), or contact us at The Pittsburgh Foundation, Five PPG Place, 2nd Floor, Pittsburgh, PA 15222-5401, (412) 391-5122.

- **PRIOR TO SUBMITTING** a full proposal, applicants are encouraged to send a letter of inquiry that includes a brief statement about the organization, the proposed project, its intended results and a general idea of project costs.
- **PROGRAM STAFF WILL** review each letter of intent and contact the organization if additional information is required. The Board of Directors makes final decisions on all grants. Notifications are mailed after each monthly meeting. The Pittsburgh Foundation also accepts the Common Grant Application, but encourages all applicants to first send a letter of inquiry.

## APPROVAL

The Pittsburgh Foundation Program and Policy Committee meets once a month to consider grants, and letters of inquiry are reviewed weekly. Grant applications or letters of inquiry received after the timeframe for any given month's meeting will be reviewed the following month.

## WHO CAN APPLY?

Grants are awarded to nonprofit organizations that are defined as tax-exempt under Section 501(c)(3) of the Internal Revenue Code. For all responsive and proactive grants awarded from unrestricted funds, nonprofit organizations must be located within Allegheny County or demonstrate that a significant majority of their population is from Allegheny County. The Pittsburgh Foundation does not award grants from unrestricted funds to individuals, nor does the Foundation generally award grants for annual operating costs, sectarian purposes, private and parochial schools, hospitals, research, endowments, capital costs, equipment, special events, conferences, scholarships, internships or awards.

# GRANTEES



There's a universe of benefits for low-income families, but often those who need the help don't know what's available to them. The situation can be a frustrating one to those who need help and to the agencies seeking to help.

Enter Benefit Bank, designed to make the process easier and more efficient for both sides. It works this way. A person meets with a staff member from a participating Benefit Bank agency that has Internet access. Typically, using the Earned Income Tax Credit (EITC) application, a staff member helps the participant enter answers to questions about income and expenditures. The Benefit Bank software calculates the award from the EITC and lists any other federal or state tax credits or benefits that might be available, including, energy assistance or food stamps.

The staff person helps the participant complete and send in the appropriate forms, ensuring participants receive benefits for which they are eligible.

"Our job is not only to make benefits and resources known and available to our

constituents, but also to build capacities with other organizations so they can offer this service too," said Al Condeluci, CEO of the United Cerebral Palsy Foundation.

The United Cerebral Palsy Foundation has started the process of introducing the Benefit Bank to low-income families and service providers alike through a \$100,000 grant from several Pittsburgh Foundation funds: the Allegheny Relief Fund, the Pittsburgh Home for Babies Fund, the Harry and Irene L. Freye Fund, the George L. and Dallas Darrow Fahey Fund, the Russel L. and the Jean Bowes Carl Fund, and the Oscar and Marjorie F. Balter Fund.

"We're reaching out to other nonprofits and human service agencies to tell them about Benefit Bank and also to help train their staffs to use the system themselves," Al said. "The hope is that people who have low incomes will feel comfortable working with the agencies they already know."

Benefit Bank is a program of the National Council of Churches being launched initially in eastern seaboard communities, then more broadly.

Benefit Bank coordinator Roslyn Maholland, standing, teaches Jeneen Asque of Health Care for the Homeless how to use Benefit Bank software, so she can help her own agency's consumers use the system. The United Cerebral Palsy Foundation introduced Benefit Bank to low-income families through a grant from The Pittsburgh Foundation.

United Cerebral  
Palsy  
Foundation



Traci Bell, a single mother, stands outside her house in Carrick, with her five sons, from top to bottom: Roy, 17, Christopher, 16, Dillan, 12, Ryan, 9 and Nick, 7. Action Housing matches money low-income families save for things such as home ownership or furthering education.

## Action Housing

For the past 15 years, the government-funded Family Savings Account program or a similar, predecessor program has been able to match money that low-income families save with an equal amount up to \$2,000. The match is granted if the savings are used for a variety of purposes including home ownership or repairs, credit repair, computer purchase and furthering education including helping grandchildren get an education.

In 2005, though, Action Housing, which oversees the program, got a one-week notification that the government funds needed for staffing would be cut. Without the staff, the Family Savings Account program would end. "The Pittsburgh Foundation was the first place I thought of," said Jonathan Zimmer, executive director of Action Housing. "I called, explained my problem, and they immediately understood. They came through in record time. It was one of the best grants we've ever gotten in my 34 years here. The Pittsburgh Foundation funding basically came in, saved the program and gave us time to plan a more permanent solu-

tion."

The two-year \$112,500 grant came through the Joseph Horne Company Trust for the Benefit of Employees, the Mortgage Escrow Interest Fund, the William C. Comptaro Fund, the Curtis Home for Girls Fund, the Oscar and Marjorie F. Balter Fund, the Cicerella Fund and the Richard S. Connolly Fund.

The participants in the Family Savings Account, who now number close to 300, are required to take a course in financial literacy or home ownership training to be eligible. More than 30 have achieved home ownership through the program.

Jonathan, 63, is retiring in June after 29 years as executive director of Action Housing. He noted the long ties between The Pittsburgh Foundation and Action Housing, both in existence since Pittsburgh's Renaissance.

"What can you say about The Pittsburgh Foundation? They're just so extraordinary, all the good work they've done over the years. We have the highest regard for them."

# GRANTEES



**R**einforcing some of its other grants and efforts, The Pittsburgh Foundation is helping build a bridge between women and minority workers and the local construction industry.

The need is obvious. Several large publicly financed construction projects are under way, including Children's Hospital and the new August Wilson Center for African American Culture. Yet the percentage of women and minority workers on these projects generally tends to be low. The problem is a national one: too few women and minority firms with too few workers to handle big jobs.

Three years ago, minority contractor Marc Little, who owns Lorraine Construction, created the Minority & Women Educational Labor Agency to change the local picture. He met with the local Carpenters Union, which agreed to work with him on a pre-apprenticeship education and training program to increase women and minority ranks in the union.

The two-year, \$227,500 Pittsburgh Foundation grant is handled through Youthworks and made possible by the Walter

and Merriam Modell Memorial Fund, the Fred C. Schatz Fund, the O.C. Prickett and Margaret Prickett Fund, the Mogus and Mance Families Fund, the Walter S. Meyer Memorial Fund, the George and Anna Neider Fund, the Emil Winter Family Fund and the Ruth and Mary Louise Schmitt Fund.

"There are two pieces to the program," Marc said. "One is in the classroom, and the other is employment." Two nights a week for 40 weeks, students with a high school diploma or G.E.D. report to the North Side to learn basic carpentry, safety and interviewing and resume writing skills. They also get help obtaining a driver's license, a necessary item for entrance to the union.

The second part is matching the students with jobs. "We're still working out the kinks on the employment side," Marc said. "We're talking with contractors, and we'll go from there. We're working on building the foundation to increase the supply of skilled workers who enter union apprenticeships leading to commercial jobs. So far it's worked out well."

Terry Bruce, a student at the Minority & Women Educational Labor Agency, works at the agency's lab where he gets hands-on building experience.

Minority  
& Women  
Educational  
Labor Agency



Gary Guydosh blows glass to be displayed at Gallery G Glass on Liberty Avenue. Lawrenceville Development Corporation has tried to increase the visibility of its design-oriented businesses, and PPND has rewarded them for making an impact.

PPND  
(Pittsburgh  
Partnership  
for Neighborhood  
Development)

Rather than pass along grant money and hope for the best, a program through the Pittsburgh Partnership for Neighborhood Development (PPND) is rewarding community groups when they make an impact. This new strategy underscores the growing need for nonprofits of all kinds to produce measurable results in an era of increasingly tight funding.

Community Development Corporations are now required to create business plans with specific goals of how they'll improve the economy of their neighborhoods. "If they do what they said they'd do, they get money," said Dorothy Lengyel, executive director of PPND. "And if they don't, they don't. We want the CDCs to act like businesses, monitoring their markets with objective information. When they do that, they get paid."

She cited the Lawrenceville 16:62 Design Zone as an example. "We've been working hard to support the Lawrenceville Development Corporation's efforts to increase the visibility of their design-oriented businesses, ultimately to increase their customer base." And they've had success. A

communications campaign the group took on resulted in 42 positive pieces in local media for the zone. A second strategy of the Lawrenceville group was to increase visitors to its Web site. Their efforts resulted in a 240 percent increase in 18 months. "We've set up a data project through Carnegie Mellon University, to help monitor the economic factors in the design zone." Some of the metrics include net new businesses, occupancy rates and the amount of business tax revenues raised.

PPND is finding that the CDCs are performing better under the new structure, in which the expectations are clear and the results are measured. So far, five of the 16 city CDCs are involved with business plans.

The \$250,000 Pittsburgh Foundation grant came through the Jane A. Downing Community Development Fund, the Wherrett Memorial Fund, the Lawrenceville Neighborhood House Fund and the Nelle M. Oliver Fund. "We share the Foundation's values around accountability," Dorothy said. "You can't have healthy neighborhoods without healthy commerce."

# GRANTEES



The Pittsburgh Foundation has made a major commitment to reducing health disparities in black families, and 2005 saw a large increase of support to the Healthy Black Family Project, enabling it to expand into the Hill District and the North Side. The project will now be city-wide, focusing specifically on reducing risk factors for diabetes and heart disease.

“We deploy a team of professionals to increase physical activity, increase consumption of fruits and vegetables, decrease fats, reduce stress and ensure that residents have a medical home,” said Stephen B. Thomas, professor of community health and social justice and director of the Center for Minority Health at the University of Pittsburgh. The Healthy Black Family Project includes providing a health coach, a nutritionist, a genetic family health history, a health risk assessment and access to disease prevention services.

The two-year, \$700,000 grant is from The Pittsburgh Foundation's Clyde F. Fagan and Dorothy M. Fagan Fund No. 4, the Harry J. Fender Fund, the Henry C. and Belle Doyle McEldowney Fund, the Lois Tack Thompson

Fund and the William Christopher and Mary Laughlin Robinson Fund. It provides the local part of a match from the Robert Wood Johnson Foundation. As of January, 2,710 participants had enrolled with 500 actively involved. Stephen cited the case of a woman who has lost 70 pounds and is now off of insulin as a result of the program. And the habits of her entire family have changed.

“We're not going in with an obesity or diabetes or cancer program. We're going in with a healthy black families program,” Stephen said. Another key is becoming embedded in the community and its culture. The program's in seven barber shops and two beauty salons.

“We're unique as a city where the foundations will come together and partner on this,” Stephen said. “The Pittsburgh Foundation was joined by Highmark, Poise and the DSF Foundation as funding partners. And The Pittsburgh Foundation came out into the neighborhoods with us. For me this has been my dream, to meet people where they live with a message they understand and trust.”

Above: participants take a water aerobics class at Kingsley Center. Top, opposite page: Maryann Donovan, left, of the University of Pittsburgh Cancer Institute talks with Monica Fisher of the Center for Environmental Oncology. Bottom: Dr. Stephen Badylak talks in his lab.

University  
of Pittsburgh  
University  
of Pittsburgh  
Cancer Institute  
University of  
Pittsburgh  
Graduate School  
of Public Health

## [reducing disparities in health outcomes]

A related 2005 grant funded the extension of community outreach and cancer prevention awareness in local minority communities. Working with the Healthy Black Family Project, the University of Pittsburgh Cancer Institute (UPCI) program also is designed to take the message of healthy lifestyles directly to the community.

“Among certain kinds of cancer, there is higher incidence in the African American community,” said Dr. Karen Singleton, associate director for outreach and education at UPCI’s Center for Environmental Oncology. Two examples are prostate cancer among men and breast cancer among women under the age of 40. Scientists believe environmental factors are linked to those cancers and others, but research has yet to conclude with certainty what many of the specific relationships are.

“Our overall mission for our outreach program is to take research findings and make an effective program for the community,” Karen said. “We talk about known risk factors and about what’s being researched.”

The Center for Environmental Oncology was created in 2004. A four-year, \$250,000

### Medical Research

A third and very exciting Pittsburgh Foundation health grant, through the Foundation’s Medical Research Initiative, is aiding the pioneering efforts of Dr. Stephen Badylak at the University of Pittsburgh’s McGowan Institute to reconstruct the human esophagus.

Now one of the most rapidly advancing cancers in America, cancer of the esophagus allows few surgical options. If a patient has pre-cancerous lesions, it is an option to remove the lesions surgically. This operation can lead to scarring and a resultant inability to swallow. For this reason, the surgical option of choice is to remove the esophagus (esophagectomy) and perform what is called the gastric pull up — pulling the stomach up to the throat and attaching it to the remaining stump of the esophagus. Still, one of two patients has serious problems after this operation and the mortality rate ranges from one to six percent. “Our gold standard is treatment with grave consequences,” said Stephen, trained as both pathologist and veterinarian. “The best we can do now is form a scar and hope it works. Regenerative medicine says this is unacceptable. Let’s see if we can do better.”

With the Foundation’s research grant,



grant from The Pittsburgh Foundation has allowed the community outreach portion to begin in earnest. The new outreach director, Monica Fisher, has 15 years of public health experience with expertise in the area of health disparities. The program has two main components. The first is in the schools, targeting eighth graders. The second is general com-

munity outreach and involves taking the message to community centers, such as East Liberty’s Kingsley Association, and other public venues.

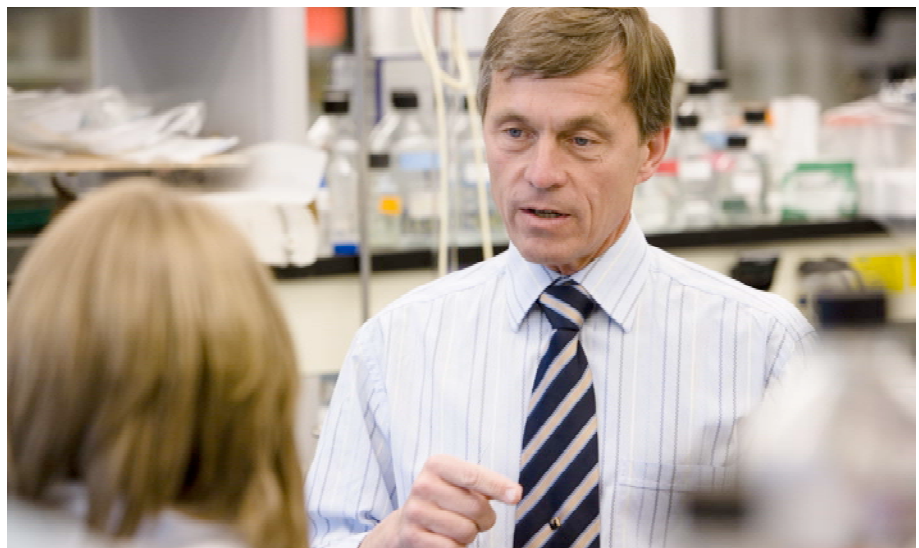
The Pittsburgh Foundation grant came through the William K. Fitch Fund, the Melissa S. McKee Carnahan Trust and the Charles A. Locke Educational and Charitable Trust.

Stephen is trying to create a malleable, biologic scaffold made of the bladder of a pig that can be shaped to fit on the esophagus. The expectation is that, instead of scarring, the esophagus will heal as a result of the remodeling provided by the scaffold. The esophagus will function and its removal will be unnecessary.

The three-year \$99,000 Pittsburgh Foundation grant from the Simeon M. Jones, Jr. and Katharine Reed Jones Fund is helping

Stephen perform a pilot study on a selected group of patients who have esophageal cancer. In the pilot, surgeons will still do the gastric pull up, but they will also place the malleable, biologic scaffold at the suture line where the stomach and esophagus are stitched.

If that works, surgeons would then try to remove lesions, put in the scaffolding — without an esophagectomy — with the goal of eliminating scarring.



# GRANTEES



The racial achievement gap in Greater Pittsburgh schools is wide, and it translates later into similar discrepancies in employment. For the past three years, the Career Literacy for African American Youth Program (CLAAY) has worked with high school students to improve their performance and future. Created by Duquesne University's Institute for Economic Transformation, CLAAY targets what the program calls "the invisible middle," students who are neither problem students nor obvious achievers.

"When you look at the Census data from 2000, you see that the African American population is extremely under-represented in the regional workforce," said Barry Maciak, executive director of the Institute.

Using tutors and mentors, CLAAY equips high school students with educational supplements, understanding and life skills, said Vernon Tipton, director of CLAAY. "These are kids who don't have problems with discipline or attendance. We try to give them the fundamentals in reading, writing and math so that they'll be able to read and

write at the level needed for higher education and any job they might want."

The tutors are usually college students, and the mentors are professionals, a group especially well represented by local law firms. Until the 2005-2006 school year, CLAAY operated in five high schools in Pittsburgh and three regional high schools.

A grant from The Pittsburgh Foundation has enabled the program to expand into all 10 city high schools. There are now 260 students involved.

Initially funded by The Heinz Endowments, the expansion of CLAAY was made possible by a two-year \$264,100 grant from several Pittsburgh Foundation funds: the William O. and Ruth Theis Grunnagle Fund, the Howard K. and Alison M. Walter Fund, the Samuel and Carrie Arnold Weinhaus Memorial Fund, the W. Alfred Turner Memorial Fund and the C. H. Snyder Fund.

"Test scores are going up," Vernon said. "And we believe we've been responsible for 80 or more of our students going on to higher education."

Mentor Oscar Worthy teaches 10th grader Brandon Hall at Carrick High School. The Career Literacy for African American Youth Program targets the "invisible middle," students who are neither problems nor obvious achievers.

Duquesne  
University



Lynn Landis, an 8th-grade teacher at South Fayette Middle School, is an ASSET resource instructor. ASSET works to improve student performance in science through professional development for teachers.

## ASSET Inc.

When concern was high in the early 1990s that American students were underperforming in math and science, a national reform movement was created with the help of the National Science Foundation and the business community. Locally, Bayer Corporation in partnership with several local corporate and educational partners initiated the development of ASSET (Achieving Student Success through Excellence in Teaching) Inc. to improve student performance in science through hands-on learning, professional development and ongoing assistance for teachers.

After starting small, the program now is in 48 districts at the elementary level, with 3,000 teachers and 125,000 students. The success is such that Gov. Ed Rendell has proposed that ASSET be made available to up to 150 Pennsylvania school districts next fall.

The Pittsburgh Foundation and other local foundations supported the initial effort, and with the elementary school success, the necessary next step was clear: going into the middle schools. Helping that program is a three-year \$105,600 Pittsburgh Foundation

grant from the Scott Hayes Trust, the H. John Heinz III Fund, the Wilbert R. Harding Fund, the Clarence G. Koepke Memorial Fund, the Martha Edwards Lazear Fund, and the Katherine Neeb McCrady Fund.

“We’re providing middle school teachers with science materials developed through research and designed to be taught in a hands-on inquiry fashion,” said Vince Valicenti, assistant director of ASSET. Teachers come to ASSET’s offices for professional development. Because it is critical to provide ongoing support after the initial instruction, resource teachers follow up with the classroom teachers in their various schools. The middle school component started as a pilot project in 2002 with 10 teachers. The 2005-2006 school year has seen the program increase to 116 teachers in 330 classes.

“If I were to say anything less than the teachers love it, I would be lying,” Vince said. “They say things like ‘This is the best professional development I’ve ever attended’ and ‘These are life changing experiences for us.’”

# GRANTEES



By any measure — artistic discipline, culture, race or the scope of the activities it hosts — East Liberty's Kelly-Strayhorn Theater has become a symbol of a diverse community working together.

Named after two legendary Pittsburgh artists: dancer and movie great Gene Kelly and jazz composer Billy Strayhorn, the 350-seat theater opened in May 2001.

It has showcased gospel groups, the New Horizon Theater and Srishti Dances of India, among others. Virtually all of the modern dance companies in the city perform there, and Kelly-Strayhorn also hosts the Hope Academy of Music and the Arts, which is the youth outreach arm of East Liberty Presbyterian Church, just across Penn Avenue from the theater.

With that success, the nonprofit running the theater needed a full-time executive director, and The Pittsburgh Foundation, through a two-year, \$75,000 grant from the Scott Fund, has made that possible.

"The theater had grown, and so had the

need for a more full-time management presence, especially in fundraising," said Robert Neu, who in March became executive director of the Community Theater Project Corporation, which oversees Kelly-Strayhorn. Robert had helped part-time since March 2002 and was hired for a combination of financial acumen, sensitivity to artists and the ability to write grants and raise money.

"The Kelly-Strayhorn is as much a service facility as it is a bricks and mortar lease facility," Robert said. "We help and support all of the groups who perform here because we raise 70 percent of the money needed to allow those performances. Clearly without The Pittsburgh Foundation and the general support from what is an overwhelmingly supportive and creative foundation community in Pittsburgh, something like the Kelly-Strayhorn simply would not exist. And in supporting the Kelly-Strayhorn, they're really supporting, in a direct pass-through, all of the 120 organizations that have used the theater."

Marcia Jones fixes her bandanna for the "Purlie Victorious" play at Kelly-Strayhorn Theater. Her co-stars Brenda Marks, at her left, and Meredith Pierce get ready with her for this New Horizon production.

Community  
Theater Project  
Corp.



Marlana Dunn performs at a mock audition at Point Park University. She is a theater arts major with a concentration in musical theater. A collaboration between Point Park and Pittsburgh's Creative and Performing Arts High School allows the university's artists-in-residence to extend their stay so they can pass on their expertise to CAPA students.

## Point Park University

When a city is fortunate enough to have a distinguished university performance program within blocks of a similarly oriented city high school, the synergies can abound. One such venture got under way in the 2005-2006 school year between Point Park University and the Pittsburgh Public Schools' Creative and Performing Arts High School (CAPA). In this new collaboration, the University's Artists in Residence Program extends the stay of national artists visiting Point Park so that they can pass on their expertise to CAPA's talented and highly motivated students.

"We saw an obvious opportunity to work with the high school students and give them the chance to learn from these artists in acting, directing, dance, choreography, lighting, sound and set design," said Susan White, Vice President for Institutional Advancement at Point Park. An artist visit typically lasts one to two weeks; and although the commitment was to do at least two experienced artists a year, eight have

taken part in the first year.

Enabling the new program was a one-year \$90,000 grant from The Pittsburgh Foundation through the Paul E. Mochnick and Henry B. Grant Fund, the James L. Baker Memorial Fund, the Jack and Tally McKee Memorial Fund, the Scott Fund and the Samuel and Carrie Arnold Weinhaus Memorial Funds.

Formalizing the partnership between Point Park and CAPA has allowed for a rich experience for the university and high school students.

"There's a lot of interactive discussion before and after performances," Susan said. "And it's stimulating dialogue on important issues in art and culture." So far 95 CAPA students and 214 Point Park students have worked with visiting artists. "It's incredible," Susan said. "We've had the students at both the Point Park and CAPA sites, and the performing students at Point Park have had great interaction with the CAPA students. The outcomes have exceeded our expectations."

# GRANT FOCUS

The Pittsburgh Foundation supports organizations from funds which respond to critical community needs and others which meet the preferences of our donors. Here we focus on some of those.



Janet Thorne, executive director of the Hollow Oak Land Trust, stands in front of garbage and parts of an abandoned car to be cleaned up near Meeks Run, a tributary in the Montour Run watershed. The Land Trust aims to preserve a green corridor along Montour Run.

## Hollow Oak Land Trust

In 1991, a group of residents in the areas surrounding Greater Pittsburgh International Airport were concerned about the prospect of rapid development. With natural land quickly disappearing, they wanted to ensure that development was balanced by the preservation of greenspaces.

The group formed the Hollow Oak Land Trust, which primarily focuses on the 37-square-mile watershed of Montour Run which flows through Moon, Robinson, Findlay and North Fayette, accepting other streams, until it enters the Ohio River.

“We’ve been concerned about preserving a

green corridor along Montour Run and the ‘viewshed’ of the Montour Trail,” said Janet Thorne, executive director of the Hollow Oak Land Trust.

The Montour Trail, a rails-to-trails corridor along Montour Run, connects with other trails, ultimately leading to Washington, D.C.

Since its founding, Hollow Oak has acquired seven major parcels totaling almost 400 acres. Four of the parcels were donated, and the Trust has purchased three others.

The Pittsburgh Foundation, through a \$50,000 grant made possible by the Peaceable

Kingdom Fund, helped the Trust purchase a tract last August. The total cost of the land plus surveying and other costs was \$175,000. The Foundation grant, the second to the Trust, provided the majority of the local match required by an \$85,000 grant from the Pennsylvania Department of Conservation and Natural Resources.

“All of our properties are open to the public for low-impact, non-motorized use,” Janet said. “Anyone can walk on them, watch birds, have a picnic and enjoy the out-of-doors. That’s the real focus of the properties.”



Renee Johnson, a reintegration specialist with Zoar NewDay, works with inmates at the Allegheny County Jail. The Jail Reintegration Project focuses on helping inmates make a successful transition to civilian life.

## Allegheny County Department of Human Services

In 2002, the Allegheny County Jail had an average daily population of 2,300 inmates. The fact that 80 percent had been in jail before stood as a stark reproach when compared with national recidivism rates of 50 percent. Shortly afterward the heads of the County Jail, Health Department and Department of Human Services began a program designed to change things. Known as the Jail Reintegration Project, the multi-year effort focuses on helping inmates make a successful transition to civilian life.

“We do intensive case management that starts while inmates are still in the jail, then we meet them on release and help them get situated,” said Marc Cherna, director of the Allegheny County Dept. of Human Services. “The case management helps the former inmates get housing, employment and basic

necessities. It helps them if they need treatment or medication or to get to meetings if needed. The idea is to intensively and aggressively be in someone's life to help him or her succeed and get the support needed.”

The University of Pittsburgh School of Social Work is doing a three-year evaluation of the project, and Mark said the initial results are very favorable. “If we can have a real impact on someone, we don't have to worry about former inmates committing another crime. And if they can get jobs and pay taxes, it reduces the burden on the rest of us.”

Partnering with Eden Hall, Child Guidance and Staunton Farm foundations, The Pittsburgh Foundation is helping with a \$100,500 grant supplied from the Katherine Neeb McCrady Fund, the Henry C. and Belle Doyle McEldowney Fund, the Melinda

Morrow Hicks Fund, the J. Raymond Price Memorial Fund, the Ruth and Harry Stein Memorial Fund and the Sara Jane Zacharias Fund. The grant provides the local match necessary to receive state money for the program.

The inmates in the County Jail are generally there for crimes that carry lighter sentences, up to 23 months. Some 90 percent of the crimes are drug-related, Mark said. And there is a large correlation with mental illness. Helping these inmates avoid repeating their mistakes is in everyone's interest, Mark said. “What's unusual is we really try to provide comprehensive services when they come out of jail. If you look at it rationally, it makes a lot of sense. While we may not succeed with every inmate, we can help a few get on track, which helps them and their families and the public, and it's cost effective.”



Michael Barthnek, a nine-year employee of Schulz Automotive in Bridgeville, was working the day of the September 2004 flood and helped people evacuate.

## The Hurricane Ivan Business Fund

When Hurricane Ivan soaked Western Pennsylvania with just under six inches of rain in one day, the flooding damaged 10,000 homes and businesses. The Sept. 17, 2004 deluge also set in motion a reaction from political and philanthropic leaders to help those in need.

The Pittsburgh Foundation convened representatives from Allegheny County, foundations, FEMA and PEMA, and the non-profit community to assess the situation. Two programs were created, one initiated by Hosanna Industries to help people repair and rebuild their damaged homes and another targeted those whose businesses and livelihoods were damaged.

The federal Small Business Administration (SBA) was able to help roughly half of the damaged business with loans to get them back on their feet.

The local effort to help damaged businesses decided to focus on businesses that didn't qualify for SBA loans because there were no

other federal or state programs that could help them, said Bob Hurley of the Allegheny County Department of Economic Development, which oversaw the program.

The Hurricane Ivan Business Relief Fund was established by 15 local corporations and foundations (The Heinz Endowments; Benedum, Citizens Bank, Dollar Bank, Grable, Hillman, Jewish Healthcare, Laurel, Pittsburgh Child Guidance, Pittsburgh, R.K. Mellon and St. Margaret Foundations; Mellon Financial Corporation; PNC Bank; and Wagner Charitable Trust) to assist businesses in 13 communities that had sustained \$500,000 or less in damages and had been turned down by the SBA.

The Fund has helped 49 businesses. The county offered a maximum \$25,000 zero percent interest loan and a matching grant of up to 80 percent from the Fund.

"To many small business owners, the loans and grants made a great deal of difference," Bob said. "It gave them a

little bit of working capital to get started again."

Many of the recipients were small retail shops, the kinds of places that make a neighborhood vital. "Our attempt was to get the small neighborhood shopping districts back up and running as soon as possible," Bob said. "If you don't have that — a place to get a sandwich or to get your shoes fixed, people will not live in the community.

"We're pretty proud of the program. The SBA told us they'd never seen a program like it in the country. The foundations were such good partners."

The \$250,000 Pittsburgh Foundation grant came via the David and Eleanor Macferron Fund, the Women's Industrial Exchange Fund, the John L. Propst Fund, the Vira I. Heinz Fund, the H. John Heinz III Fund, the Lois Tack Thompson Fund, the Fund for Public Giving, the W. Alfred Turner Memorial Fund and the Henry C. and Belle Doyle McEldowney Fund.

# FINANCIAL INFORMATION

## Combined Statements of Financial Position

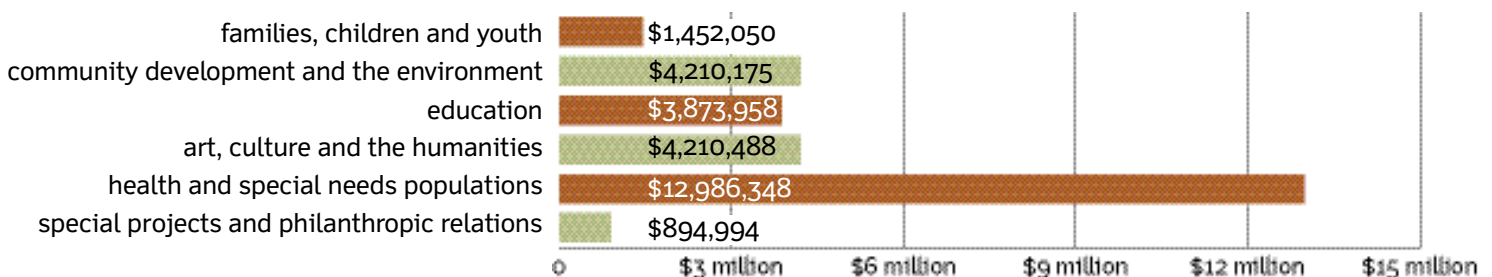
THE PITTSBURGH FOUNDATION, Parent Only

December 31, 2005 and 2004

<b>ASSETS</b>	<b>2005</b>	<b>2004</b>
Cash and cash equivalents	\$65,026,701	46,973,187
Investments, at market value	535,601,785	493,165,470
Accounts and interest receivable	1,614,317	1,539,827
Program-related loans receivable and investments	948,000	878,667
Contributions receivable	41,182,301	39,190,872
Property and equipment, net	770,291	914,052
<b>TOTAL ASSETS</b>	<b>\$645,143,395</b>	<b>582,662,075</b>
<b>LIABILITIES AND NET ASSETS</b>		
Grants payable, net	9,919,804	13,080,712
Accounts payable and other liabilities	8,798,122	2,686,044
Accrued pension liability	819,871	941,522
<b>TOTAL LIABILITIES</b>	<b>19,537,797</b>	<b>16,708,278</b>
<b>NET ASSETS</b>		
Unrestricted	51,855,018	25,657,164
Temporarily restricted	566,740,867	533,399,875
Permanently restricted	7,009,713	6,896,758
<b>TOTAL NET ASSETS</b>	<b>625,605,598</b>	<b>565,953,797</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$645,143,395</b>	<b>582,662,075</b>

## Summary of Grants By Category

For the year ended December 31, 2005



Combined Statements of Activities

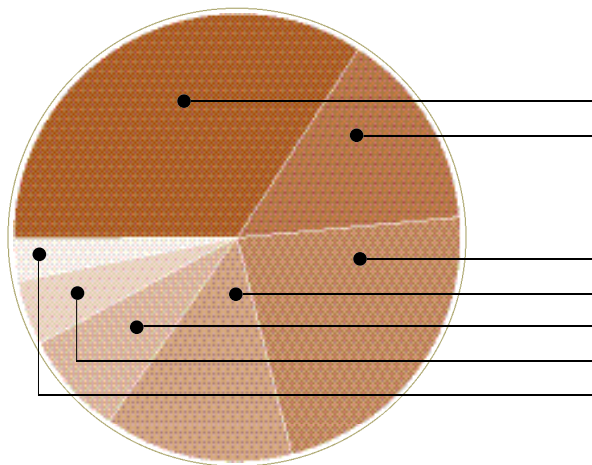
THE PITTSBURGH FOUNDATION, Parent Only

Years ended December 31, 2005 and 2004

<b>REVENUES AND GAINS</b>	<b>2005</b>	<b>2004</b>
Contributions	\$50,378,301	24,319,819
Investment income, net	11,787,709	11,154,769
Net realized and unrealized gains (losses) on investments	30,005,433	36,670,364
Actuarial adjustments on split interest agreements	442,195	1,952,867
Other	218,843	121,094
<b>TOTAL REVENUES AND GAINS</b>	<b>92,832,481</b>	<b>74,218,913</b>
<b>EXPENSES AND LOSSES</b>		
Grants approved, net	27,628,013	20,009,042
Grantmaking and related services expenses	2,020,177	2,361,907
Development and donor services expenses	1,635,061	1,777,493
Management and general administrative expenses	1,690,784	1,496,282
Other	206,645	282,856
<b>TOTAL EXPENSES AND LOSSES</b>	<b>33,180,680</b>	<b>25,927,580</b>
Increase (decrease) in net assets	59,651,801	48,291,333
Net assets at beginning of year	565,953,797	517,662,464
<b>NET ASSETS AT END OF YEAR</b>	<b>\$625,605,598</b>	<b>565,953,797</b>

Assets by Fund Type

For the year ended December 31, 2005



	<b>2005</b>	
Undesignated	180,922,060	34.40%
Field of Interest	75,694,832	14.39%
	<b>256,616,892</b>	<b>48.79%</b>
Advised	118,112,479	22.46%
Designated	71,314,918	13.56%
Scholarship	39,176,322	7.45%
Medical Research	26,102,046	4.96%
Special Purpose	14,604,068	2.78%
	<b>269,309,833</b>	<b>51.21%</b>
	<b>525,926,725</b>	<b>100.00%</b>

**[supporting organizations]** The Pittsburgh Foundation is affiliated with seven supporting organizations with total assets of \$40,100,384.00. The supporting organizations are separate entities that are exempt under section 501(c)(3) of the Internal Revenue Code of 1986. Each qualifies for the highest federal income tax deduction as a public charity because its charitable activities complement and further the charitable activities of The Pittsburgh Foundation. While they are separate entities, The Pittsburgh Foundation handles all administrative issues for the supporting organizations, relieving the donors of any administrative burden.

**1** A supporting organization at The Pittsburgh Foundation is designed for families and individuals who want to maintain independence in charitable giving, while benefiting from the Foundation's grantmaking and financial services expertise.

**2** Custom-tailored for endowments of approximately \$2 million or more, a supporting organization is a tax-exempt entity that offers you, as a philanthropist, the benefits of a private foundation, greater tax advantages available to a public charity, and the opportunity to engage in grantmaking decisions.

**3** Whether you choose to give locally or outside the region, the services provided by The Pittsburgh Foundation release you from the burdens of state and federal reporting, and the numerous and expensive administrative tasks associated with running a private foundation. And you and your family are able to remain involved in perpetuity.

## A supporting organization also allows you to:

### **SELECT A MONEY MANAGER.**

Your Board can decide who shall invest and administer the assets.

### **PAY REASONABLE ADMINISTRATIVE FEES.**

Our team of professionals assumes the responsibility for all filing and compliance requirements.

### **ESTABLISH YOUR OWN GRANTS BUDGET.**

You make charitable distributions as you see fit and are not limited to the Foundation's grantmaking budget or spending policy.

### **IDENTIFY FUTURE TRUSTEES.**

You leave a charitable legacy and keep decision-making within your family or with close associates, in perpetuity.

### **AVOID EXCISE TAXES AND ANNUAL DISTRIBUTION REQUIREMENTS.**

You are not required to distribute a specified amount each year (as private foundations are), so you make only the gifts that you are inspired to make.

### **RECEIVE ASSISTANCE FROM THE FOUNDATION'S PROGRAM STAFF.**

Our professionals can share their in-depth knowledge of community needs and, if you choose, help you decide where your charitable dollars go.

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Your gifts to 501 (c)(3) organizations will be monitored to ensure that your contributions are used according to your directives.

# GIVING NOW AND IN THE FUTURE

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Allegheny Cemetery Historical Association Fund  
The ARC of Butler County Endowment Fund  
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On behalf of the Pittsburgh community, we would like to express our profound gratitude to all our generous donors. We would also like to thank the members of the Legacy Society for strengthening our community's future.

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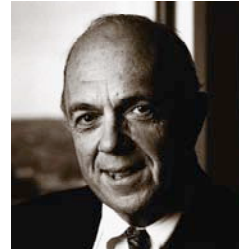
**Robert P. Bozzone** is Chairman of Allegheny Technologies, Chairman of Water Pik Technologies, Inc., a Director of Teledyne Technologies Inc., and a Director of DQE, Inc. Mr. Bozzone is a former Chairman of the Pittsburgh Branch of the Federal Reserve Bank of Cleveland, and is a member of the Board of Trustees of Rensselaer Polytechnic Institute. He previously served on the Salvation Army Advisory Board and is former Chairman of the Board of the Greater Pittsburgh Council, Boy Scouts of America.



**James Broadhurst** is the Chairman and CEO of Eat' n Park Hospitality Group. He serves on the Board of Directors of the Allegheny Conference on Community Development and is a Trustee of Pennsylvania State University. Mr. Broadhurst previously served as Chairman of the Board of Directors of Children's Hospital of Pittsburgh and of United Way of Allegheny County. Mr. Broadhurst retired from The Pittsburgh Foundation's Board of Directors in March 2005 after serving with distinction for five years as Chairman, and as a Board member since 1995.



**JoAnne E. Burley, Ph.D.** is Executive Director of Pittsburgh Council on Higher Education, a consortium of 10 colleges and universities in Allegheny County. Previously, Dr. Burley served as CEO/Chancellor of the McKeesport Campus of Pennsylvania State University. Dr. Burley received her doctorate from the University of Pittsburgh in literacy and adult education, with post doctoral studies at Harvard University. She serves on the boards of The Forbes Funds, UMPC Health Systems, Multicultural Arts Initiative, Negro Emergency Education Fund, Pittsburgh Public Service Fund, Beverly Jewel Wallace Lovelace Advisory Board of Family Resources, and Greater Pittsburgh Literacy Council. She is a Life Trustee for The Carnegie Institutes and Library.



**Joseph L. Calihan**, Treasurer of the Board of Directors, is Managing Partner in Bradford Capital Partners. He is Chairman of Bradford Schools, Inc., Median School for Allied Health Careers, Caldon Co. and Novum Pharmaceutical Research Services. Mr. Calihan serves on the Board of Directors of the Historical Society of Western Pennsylvania and the Extra Mile Education Foundation. He also serves on the Investment Advisory Committee of the Allegheny Conference on Community Development and the Advisory Council of the Women's Center & Shelter of Greater Pittsburgh.



**Estelle F. Comay**, Secretary of the Board of Directors of The Pittsburgh Foundation, is a partner in the law firm of Marcus & Shapira LLP. She serves as Chair of The William J. Copeland Fund, and also serves on the Board of Directors of The Pittsburgh Symphony, the Three Rivers Arts Festival, and on the National Board of Governors of the American Jewish Committee, among others. She has also served as past Chair of the Lawyers Committee of the Negro Education Emergency Drive and as a member of the Community Study Committee of the United Jewish Federation.



**Gregory D. Curtis**, is a Managing Director and Chairman of Greycourt & Co. Inc. Mr. Curtis is a past Chair and current member of the Board of Visitors and Governors of St. John's College in Annapolis, Maryland and Sante Fe, Mexico. He is also a past Chair and founding Director of The Investment Fund for Foundations.



**George A. Davidson, Jr.**, Chairman of the Board of Directors of The Pittsburgh Foundation, is the retired Chairman of the Board of Dominion Resources, Inc. He is a Trustee of The Pittsburgh Cultural Trust and the Carnegie Institute, a Director of the Civic Light Opera, and a member of the Board of the United Way of Allegheny County and of UPMC Presbyterian/Shadyside Hospitals. Mr. Davidson is a Trustee of the University of Pittsburgh, where he serves on the Board of Visitors of the Katz Graduate School of Business and of the School of Engineering. Mr. Davidson was elected Chairman of The Pittsburgh Foundation's Board of Directors in March 2005.



**Linda A. Dickerson** is the founder of 501(c)(3)squared, a nonprofit management consulting practice. She served as publisher of Executive Report magazine and as the Business Columnist for the Pittsburgh Post-Gazette. Currently Chair of the Greater Pittsburgh Phi Beta Kappa Association, Ms. Dickerson has been a prolific civic leader, chairing over one dozen community boards. She is particularly active on her alma mater's Board of Trustees at Carnegie Mellon University.



**John C. Harmon** is a partner at the law firm of Lovett Bookman Harmon Marks LLP, where he concentrates on estate and trust law. He is a member of the Boards of Trustees of The Linsly School and the Pittsburgh History & Landmarks Foundation, and serves on the Boards of Directors of the West Virginia University Foundation and the St. Margaret Foundation.



**Peter F. Mathieson** is Managing Director and Executive Vice President with Guyasuta Investment Advisors, an asset management firm he helped to found in 1994. Previously, he was a Portfolio Manager with Scheetz, Smith & Company and an Investment Advisor with Parker/Hunter. A resident of Fox Chapel, where he lives with his wife, Carol, and four children, Mr. Mathieson graduated from Bucknell University in Lewisburg in 1983 with a B.A. in Economics. Mr. Mathieson is also a Director of The Buhl Foundation, The Pittsburgh Cultural Trust, The Carnegie Hero Fund Commission and The Mentoring Partnership of Western Pennsylvania.

The board of directors of The Pittsburgh Foundation comprises outstanding leaders from all sectors of the community. The commitment, generosity and experience of our Board greatly enhance the mission and success of The Pittsburgh Foundation.



**Mary Lou McLaughlin** is a member of numerous Boards of Directors, including the Committee for Oversight in Organ Transplantation, International Women's Forum-Western Pennsylvania Chapter, Little Sisters of the Poor, The McGowan Institute for Regenerative Medicine, Pittsburgh Tissue Engineering Initiative, the UPMC/City of Pittsburgh Marathon, and WQED Pittsburgh. She is a former Executive Director of Family House and the former Director of Corporate Relations at the University of Pittsburgh Medical Center.



**James C. Roddey**, was Chief Executive of Allegheny County from 2000 to 2004, the first elected to that office. Many years in the public sector preceded his election as Chief Executive, including four years as Chairman of the Port Authority Transit and five years as Chairman of the Pittsburgh Water and Sewer Authority. His work in private industry includes the Presidencies of Turner Communications Corp. and Rollins Communications Corp. In the nonprofit arena, he has served as President or Chairman of numerous institutions: the Eye & Ear Institute, Pittsburgh Blind Association, Three Rivers Arts Festival, Pittsburgh Public Theater, United Way of Allegheny County, Pittsburgh Clean City Committee, Pittsburgh Three Rivers Regatta and WQED Pittsburgh.



**Edith L. Shapira, M.D.**, has a private practice in general psychiatry, which she has maintained since 1991. Edie is active in a variety of endeavors in health care, and she also maintains an active life in community service. She serves on the Joint Boards of Directors for Presbyterian and Shadyside Hospitals, and has held a variety of roles in UPMC system. She is the Co-chair of the Riverlife Task Force, and she also serves on the Board of Directors and Steering Committee of A+ Schools.



**Gregory R. Spencer** is the former Senior Vice President and Chief Administrative Officer of Equitable Resources, Inc. He is a trustee of Robert Morris University and Bethel A.M.E. Church. Mr. Spencer also serves on the Boards of Directors of the Urban League of Pittsburgh, Boy Scouts of America, the Institute of Transfusion Medicine, Education Policy and Issues Center, Pittsburgh Mercy Health System, Negro Educational Emergency Drive (NEED), and the African American Chamber of Commerce.



**Aaron A. Walton**, Vice Chair of the Board of Directors of The Pittsburgh Foundation, is Senior Vice President of Strategic Community and Health Initiatives at Highmark, Inc. He is active in many organizations and institutions including California University of Pennsylvania, Gateway Health Plan, the Health Education Center, the Youth Crime Prevention Council of Allegheny County, the Allegheny County Human Services Oversight Committee and the Lifestyle Advantage Board of Managers.



**Nancy D. Washington, Ph.D.**, Assistant Secretary of the Board of Directors of The Pittsburgh Foundation, is an Associate Professor Emerita and a former Assistant to the Chancellor of the University of Pittsburgh. She is a member of the Board of Directors of Girls, Inc., the Frick Arts and Historical Center, Point Park College and the Women's Committee of the Carnegie Museum of Art. Dr. Washington is also a member of the Executive Committee of The Pittsburgh Cultural Trust, as well as President of the Board of Directors of the Pittsburgh Child Guidance Foundation.



**Robert B. Webb** is Chief Operating Officer with Tucker Arensberg, P.C., a 70-attorney law firm based in Pittsburgh. He also serves as Adjunct Professor at H. John Heinz III School of Public Policy and Management at Carnegie Mellon University. Previously, he worked with the Allegheny County government for 24 years, most recently as County Manager following the County government's reorganization in 2000. Mr. Webb- also an official scorer for Major League Baseball- has a law degree from Duquesne University, and he graduated from the University of Notre Dame with a B.A. in government. Mr. Webb and his wife, Cheryl, live in Indiana Township and have three sons.

## DIRECTORS EMERITI

**William J. Copeland** is a Director Emeritus of The Pittsburgh Foundation, as well as a retired Vice Chairman of PNC Financial Corporation. He is founding Vice Chairman of the Health Education Center, and Chairman Emeritus of Family House and of the Civic Light Opera. Mr. Copeland is a co-founder and Vice President of the National Flag Foundation and Director Emeritus of St. Clair Memorial Hospital.

**Douglas D. Danforth** is a Director Emeritus at The Pittsburgh Foundation. He is also a Director of Sola International, Inc., and Envirosource, Inc. He is the retired Chairman and Chief Executive Officer of the Westinghouse Electric Corporation. Mr. Danforth is also the past Chairman of the Board of the Pittsburgh Pirates. He is also past Chairman of the Board of Carnegie Mellon University and continues to serve as a Life Trustee of the University. Mr. Danforth also serves as a Trustee of Syracuse University.

**Arthur J. Edmunds**, Director Emeritus of The Pittsburgh Foundation, is the former Executive Director of the Urban League of Pittsburgh. He currently serves on the Board of Directors of the Pittsburgh History and Landmarks Foundation, the Regional Industrial Development Corporation of Southwestern Pennsylvania, the Health Education Center, and the Caring Foundation, and he is an Emeriti Board member of the Western Pennsylvania Allegheny Health Care System. Mr. Edmunds has also served on the Presbyterian-University Hospital's Committee for Oversight in Organ Transplantation and on the Board of Directors of the Lemington Home for the Aged.

**Alvin Rogal**, Director Emeritus of The Pittsburgh Foundation, is Chairman of Hilb, Rogal and Hamilton Company of Pittsburgh. He is a Director and founding Chairman of the Jewish Healthcare Foundation, as well as

past President and current Director of the United Jewish Federation and past President of Montefiore Hospital Board of Trustees. Mr. Rogal serves as a Director of the Jewish Community Center of Greater Pittsburgh, is a Fellow of Brandeis University, a Robert Morris University Board Trustee, and a Carnegie Mellon University Life Trustee.

**Dorothy R. Williams** is a Director Emerita of The Pittsburgh Foundation. She is a life member of the Board of Directors of Planned Parenthood, and formerly served as a member of the national board and as President of the Pittsburgh chapter. Ms. Williams is a founder and former President of Women's Health Services, a former Trustee of Pikesville College and Shadyside Presbyterian Church, former Director of the Fox Chapel Country Day School, and a former member of the Board of Directors of The Children's Home of Pittsburgh.

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