

THE PITTSBURGH FOUNDATION

community

FORUM

SPRING 2013



THE CENTER THAT C.A.R.E.S.

SEE PAGE 6

WELCOME

LET US SET HIGH EXPECTATIONS FOR NEXT MAYOR

The Pittsburgh Foundation was delighted recently to partner with WQED Multimedia and the Urban League of Pittsburgh in hosting a forum for candidates in the city's mayoral elections. The issues on which we focused are those which all too often become hidden behind the glow of our region's many achievements but which, nonetheless, dominate the overall well-being of our community: poverty and race.

Pittsburgh's enormous advancements in recent years are unequivocal, although it must be said that the city's accolades as "Most Livable City," beg the question "Most Livable for Whom?"

That is not to disregard the solid ground there is for optimism. Our city's riverfronts are in the advanced stages of radical transformation, we are a recognized and respected leader of urban design and green building development, and we are at the forefront nationally of addressing urgent reform issues within our public school system.

We have a Cultural District that is second to none, there is an array of Downtown development projects on the drawing board and continued revitalization programs in our city neighborhoods.

But against the background of the on-going Federal investigation into Pittsburgh's police operations, and the withdrawal of Luke Ravenstahl, the current incumbent, from our city's mayoral elections, we should ask ourselves: What kind of future leadership do we want for our community?

When the time comes for our next Mayor to take office—let us expect our new leader to embrace our city's accomplishments while taking a bold and visionary stand in helping to shape Pittsburgh's future.

Let us expect Pittsburgh's civic leadership to nurture an atmosphere where business can thrive, where our hard-won reputation is advanced and where the vulnerable, the underprivileged and the disadvantaged are protected.

Let us expect our leadership to work across all areas, including the corporate, nonprofit, academic and public sectors, in effective and inspiring partnerships that will foster innovation, entrepreneurship and creative solutions.

And let us expect our leader to focus on Pittsburgh's dominant critical issues, including those around race and poverty.

We should set the highest expectations for our next Mayor and for ourselves. Let us all pledge to play our part in striving to turn the big dreams we have for our community into reality.



IN THIS ISSUE:



3
DONOR GIVING CIRCLES



5
EDITH SHAPIRA
ELECTED BOARD CHAIR

6
A YOUNG MAN'S
LEGACY INSPIRES A
CENTER TO HELP
LOCAL TEENS



8
CREATING A COMMUNITY
OF OPTIONS FOR PEOPLE
WITH DISABILITIES

10
BUILDING LASTING
TRIBUTES TO OUR
COMMUNITY'S
FALLEN HEROES



13
FOUNDATION
SETS THIRD
SUCCESSIVE
ANNUAL
FUNDRAISING
RECORD



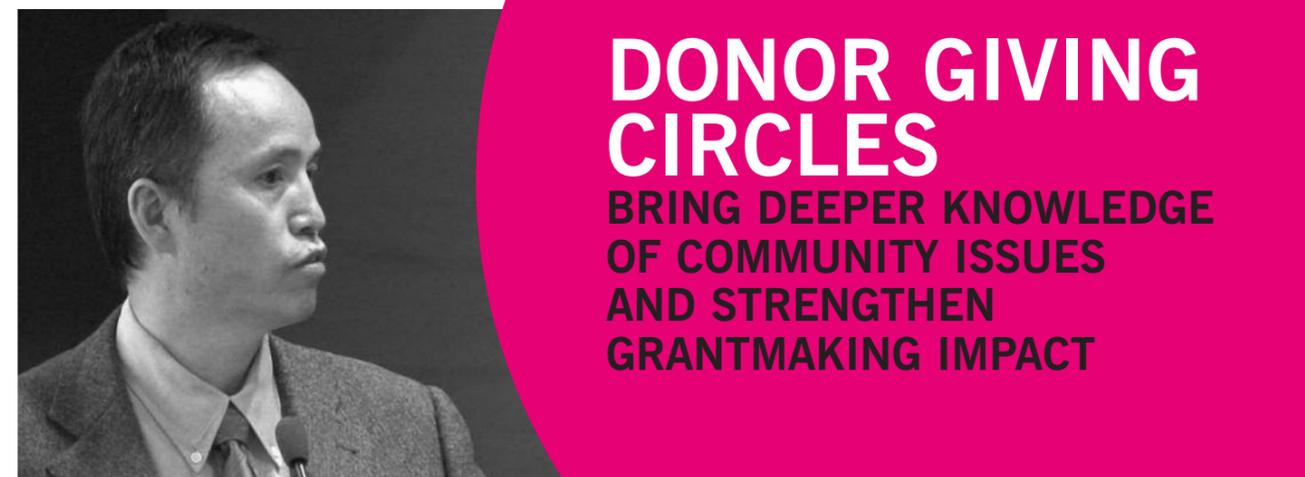
14
WORKING TOGETHER
FOR CLIENTS AND
THE COMMUNITY

FOCUS ON WESTMORELAND:



16
A SCHOLARSHIP
CREATES A LASTING
MEMORY OF
BRANDON BOYD

18
JIM AND BETTY
MORRISON:
EDUCATION IS
THE FUTURE



DONOR GIVING CIRCLES
BRING DEEPER KNOWLEDGE OF COMMUNITY ISSUES AND STRENGTHEN GRANTMAKING IMPACT

THE PITTSBURGH FOUNDATION has launched an innovative new program with donors to enhance their knowledge and understanding of critical issues in the local community and to partner on collaborative funding initiatives.

Called the Giving Circle, the program includes information-gathering for donor groups focusing on specific issues that are central to the well-being of the Pittsburgh community, site visits to nonprofit organizations, and collaborative grants with the Foundation to support strategic philanthropic projects.

Each Giving Circle is an individually designed program and brings together a group of 20 of the Foundation's donors to examine an issue about which they share a passion and common interest. The Foundation's first Giving Circle was launched earlier this year addressing Health and the Environment.

continued, next page

Top to bottom:
Shivendra Singh
Jian-Min Yuan
Maryann Donovan



Grant Oliphant
President and CEO
The Pittsburgh Foundation

“WE VIEW THIS PROJECT AS HELPFUL IN ESTABLISHING EVER CLOSER PHILANTHROPIC PARTNERSHIPS WITH OUR DONORS IN TACKLING ISSUES WHICH CONCERN US ALL... BY WORKING TOGETHER IN THIS WAY WE ARE ABLE TO ALIGN THEIR PHILANTHROPIC EFFORTS WITH THOSE OF THE FOUNDATION, STRENGTHENING OUR KNOWLEDGE AND UNDERSTANDING AND THE IMPACT WE ARE ABLE TO ACHIEVE THROUGH COLLABORATIVE GRANTMAKING.”

Grant Oliphant, President and CEO, The Pittsburgh Foundation

“We view this project as helpful in establishing ever closer philanthropic partnerships with our donors in tackling issues which concern us all,” said Grant Oliphant, the Foundation’s President and CEO. “Our donors have a wide range of charitable interests. By working together in this way we are able to align their philanthropic efforts with those of the Foundation, strengthening our knowledge and understanding and the impact we are able to achieve through collaborative grantmaking.”

Donors participating in the current Giving Circle have each committed to contribute towards a \$50,000 pooled fund, which is being matched by the Foundation to create a total grantmaking pool of approximately \$100,000.

Members of the Giving Circle are conducting site visits to various organizations in the community to explore connections between environmental issues and health, including the Hillman Cancer Center, the Children’s Institute and Children’s Hospital. The research phase of their work will also involve seminars and briefings with various experts in the field together with help and guidance from the Foundation’s professional staff.

After completing an evaluation process, the Giving Circle will award funding to support the work of one or more organizations. The Foundation expects that grants will be awarded from its first Giving Circle by early Fall 2013.

“This is very much a prototype but the response we have received from donors has been very enthusiastic and supportive,” said Grant Oliphant. “We are limiting numbers in each Giving Circle to 20 donors as an optimum size to have a meaningful experience and already we have heard from a number of donors who would like to be included in future groups.”

Additional Giving Circles are planned, potentially including groups that will address issues such as public education, at-risk youth and next-generation philanthropy.

The Giving Circles are among the initiatives of the Foundation’s new Center for Philanthropy that will be rolled out later this year, providing a philanthropic hub for the organization’s donor family designed to enhance charitable giving in the local community.

Other major features of the Center for Philanthropy will include guidance and advice for donors around strategic grantmaking, education and training and a comprehensive array of state-of-the-art technology tools for research, fund management and grants distribution.

EDITH SHAPIRA ELECTED BOARD CHAIR OF THE PITTSBURGH FOUNDATION



THE FOUNDATION has re-elected Edith L. Shapira, M.D. to its Board of Directors. She is appointed as Chair of the Board — the first woman to Chair the organization in its 68-year history.

Dr. Shapira, a psychiatrist in private practice since 1991, was re-elected after retiring from the Foundation’s Board last year following nine years service. As Chair of the Foundation’s Board she succeeds Gregory Curtis, founder and Chairman of global wealth advisory firm, Greycourt & Co. Inc, who retired from the Foundation’s Board in December 2012 after serving as its Chair for four years and as a Board member since 2003.

During her previous term with the Foundation’s Board, Dr. Shapira helped to lead a major transformation of the organization, including a strategic re-alignment to maximize its grantmaking impact and the development of philanthropic initiatives that became models for similar programs by other foundations across the United States.

And for Dr. Shapira, her return continues a dedicated family legacy with the Foundation, originally established by her late mother, Frieda Shapira who served on the Foundation’s Board for 18 years. Frieda retired from the Board in 2002 and passed away the following year.

“This is a special moment in the Foundation’s history,” said Grant Oliphant, the Foundation’s President and CEO. “The commitment and influence that Edie and her mother have contributed to the positive development of this organization are immeasurable. I am delighted to welcome Edie’s return to our Board, and it is fitting and appropriate that she does so as our first woman Board Chair. We know that Frieda would have been proud of that.”

Frieda, like her daughter after her, served for many years as Chair of the Foundation’s Program and Policy grantmaking committee, and was elected Vice Chair of the Board towards the end of her tenure.

“In a different time, Frieda might well have become the Foundation’s first woman Chair,” said Mr. Oliphant. “There is no question that Frieda remains among a small number of past Board members whose service spanned so many years and whose influence was so great in our organization’s successful development.”

Dr. Shapira’s appointment as Board Chair is effective January 1, 2013.

Throughout her previous nine-year service with the Board, Dr. Shapira served on the Foundation’s Program and Policy Committee, and she was elected Chairman of the Committee in 2008. Among her accomplishments was the reorganization of the Foundation’s funding of medical research with the creation of three endowed chairs in innovative cancer research, personalized medicine and psychotic disorders at the University of Pittsburgh.

Well known for her support of a wide range of charitable causes in the region, Dr. Shapira serves on the boards of the Pittsburgh Promise, Riverlife where she also served as co-Chair, the Board of Visitors of the University of Pittsburgh School of Social Work, the Allegheny County Board of Health and the Institute of Politics Shale Gas Round Table.

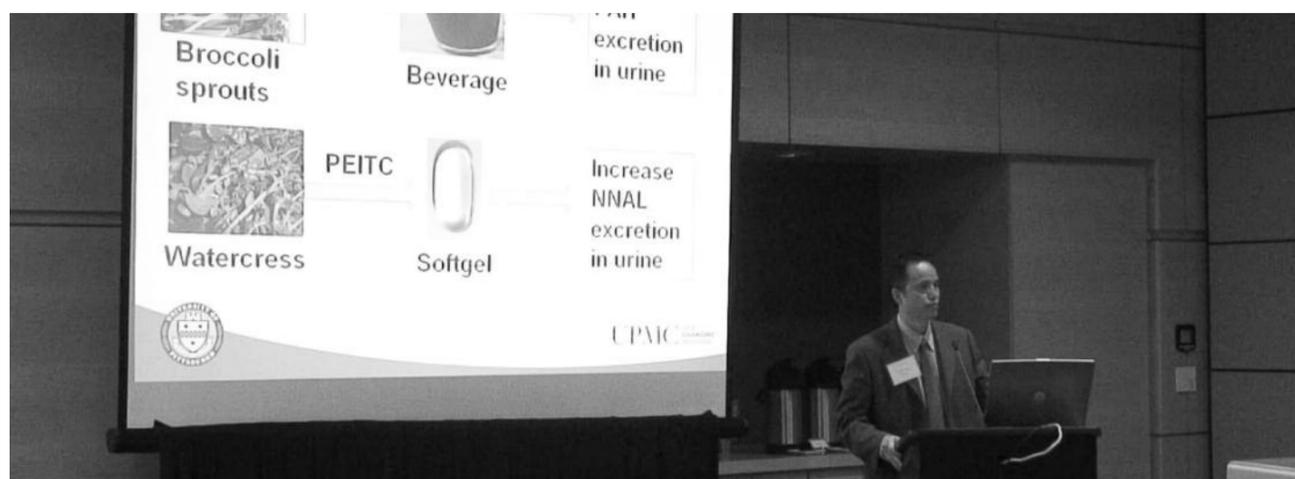
Dr. Shapira previously served on the boards of UPMC Presbyterian-Shadyside Hospitals, the Institute of Politics Water Management Task Force, and the Western Pennsylvania Conservancy and is a recent past director with the Sports and Exhibition Authority and the Urban League of Pittsburgh.

Dr. Shapira is a Clinical Assistant Professor of Psychiatry at the University of Pittsburgh School of Medicine. For each of the past 10 years she has been elected by her peers as one of the Best Doctors in America. In 2006, she was named a Distinguished Daughter of Pennsylvania by Governor Ed Rendell for her work to help those who were displaced by Hurricane Katrina.

“It is a profound honor to return to the Foundation’s Board, and especially in the role as Chair,” said Dr. Shapira. “The Pittsburgh Foundation is an incredibly important organization that has and continues to make a big difference in our community. I am looking forward to continue working with the Foundation’s inspirational leadership, staff and my Board colleagues in a region about which I care very deeply.”

Also returning to the Foundation’s Board is **John Harmon**, a partner with law firm, Lovett Bookman Harmon Marks LLP, where he concentrates on estate and trust law. Mr. Harmon was also re-elected after retiring from the Board last year following nine years service. Mr. Harmon is elected as Vice Chair, succeeding Jim Roddey who also retired from the Board.

Two new directors elected to the Foundation’s 19-member Board are: **Lee B. Foster, II**, Chairman of L.B. Foster Company, a Pittsburgh-based manufacturer and distributor of rail and construction products; and **David J. Malone**, President and CEO of Gateway Financial, which he helped found in 1982.



A YOUNG MAN'S LEGACY INSPIRES A CENTER TO HELP LOCAL TEENS



ON AN OCTOBER NIGHT in 2010, Jeron X. Grayson was attending a gathering of friends at California University of Pennsylvania when an intruder opened fire. He was accidentally hit by gunfire, ending his young life. The tragedy lives on in the memory of Jeron's family and friends, and now his father, Rev. Glenn Grayson has created a permanent legacy for his son.

Rev. Grayson's organization, the Center That C.A.R.E.S., which has been helping children from Pittsburgh's Hill District become doctors, lawyers and teachers for over thirteen years, has purchased the former Ozanam Community Center in the Hill District, renaming it to honor Jeron's memory. C.A.R.E.S. is an acronym for Children/Adults Recreational and Educational Services.

The former Ozanam Community Center is a 13,000 sq. ft. facility located on Enoch Street in the Hill District. "By reopening this center, we can honor Jeron's memory and once again utilize this building to affect the lives of young people for generations to come," said Rev. Grayson.

"Jeron was affectionately called 'G' and he was passionate about making a difference," said Rev. Grayson. "He cared especially about gun violence and its effect on his community and society. As we continue his campaign, we have adopted his 'G' to now stand for never touch a gun."

C.A.R.E.S. has impacted the lives of more than 2,000 families over its history. During the academic school year, more than 100 children and youth attend the afterschool enrichment and tutoring program from 2:30 PM to 6:30 PM four days a week. In the summer, the program expands 9:00 AM to 5:00 PM for eight weeks. The Center also sponsors a summer basketball league that serves another 100 kids with safe after-hours recreation opportunities.

The Center that C.A.R.E.S has raised \$1.1 million, including a \$100,000 grant from The Pittsburgh Foundation, towards their goal of \$1.3 million. Construction is planned to start in spring of 2013 with a grand opening slated for January 2014.



"The most vulnerable group is high school students," said Rev. Grayson. "There are not enough after school places for this age group and summer and night schools have been eliminated due to budget cuts. These are the ones that are slipping through the cracks."

The new Jeron X Grayson Center, when completed, will give this age group a safe place to spend their time with recreational, cultural and educational opportunities as well as access to therapeutic services for those dealing with trauma.

"We often have kids in the C.A.R.E.S. program that knew the victim and kids that knew the perpetrator," said Rev. Grayson. "When a child dies in an auto accident there are counselors. When someone dies on the street, no one shows up. We need to provide wraparound services for these children so they can become healthy adults."

Taylajuneic started in the C.A.R.E.S. program when she was four years old. She is now 17 and a junior at the Science and Technology Academy where she is studying environmental science. She is one of several high school and college students that tutor younger students after school.

"The kids are very active but really sweet and have a hunger to learn," said Taylajuneic. "I see how hard my mom works and I strive to be like her and help my neighborhood." She has a 3.5 grade average and plans to attend Syracuse or Howard University upon her graduation.

Like Taylajuneic, the Center that C.A.R.E.S. has a bright future, but they were concentrated on their immediate future, a trip to Columbus for 50 of their kids to see the Cleo Parker Robinson Dance Ensemble and they will visit some colleges along the way. Melissa Tyler, a dancer in the troupe, is a C.A.R.E.S. graduate.

"It is important for the kids to see that they can follow their dreams, leave behind violence and become a successful, healthy adult," said Rev. Grayson.

CREATING A COMMUNITY OF OPTIONS

for People with Disabilities



A PUBLIC/PRIVATE INITIATIVE lead by Achieva in Pittsburgh seeks to create innovative support solutions for people with disabilities and reduce a state-wide waitlist that has grown to more than 15,000 families this year.

Achieva is a national leader in the disability field, known for its innovation and steadfast dedication to children and adults with disabilities and their families. The organization provided service and advocacy support for more than 60 years. Now, the group has developed an innovative program, A Home of My Own, employing family and community resources to address the waitlist.

“More and more people with intellectual and developmental disabilities are waiting longer and longer for the basic services that they need to live safely in their homes,” said Marsha Blanco, President and CEO of Achieva. “A Home of My Own connects families and groups of families with private and public resources to give a person with disabilities the ability to move from a family home and live independently.”

The program is critical as people with disabilities are living far longer, often into their sixties and seventies, with access to advanced medicine. Their caregivers, typically their parents, are aging at the same time and often reach a point in their lives where they can no longer care for their adult child.

In the past, a person with a disability would often be sent to institutional care at a cost of approximately \$240,000 a year. Over the last several years, many of these institutional options have been closed to reduce costs and that has caused the statewide waiting list to swell to epidemic levels as the state scrambles to place families with community services.

Pennsylvania Governor Tom Corbett asked the State Legislature to appropriate \$20 million in fiscal year 2013-2014 to reduce the waiting list, which is eligible for Federal matching funds. The State and Federal funding could reduce the waiting list by only 1,200 people during the year.

Families favor the community option as it has proven to yield a higher quality of life for a person with a disability. It also typically costs less than institutional care, \$100,000 per year on average, to provide the services an individual needs to live in their own home.

“Achieva believes its new model will succeed because it is based on families of people with disabilities investing, advocating and working together to make their dreams a reality,” said Nancy Murray, President, The Arc of Greater Pittsburgh. “Through the Waiting List Reduction Initiative, each group of families will work with a highly trained and knowledgeable support broker to customize a living arrangement and choose the neighborhood in which the people with disabilities will live.”

Achieva has developed a cost-effective assessment tool that accurately identifies the types and levels of support that each person needs. The tool also helps to ensure that housemates are compatible, developing a life-long bond between roommates.

“Families come from diverse geographical, racial, cultural and socio-economic backgrounds,” said Ms. Blanco. “They have formed bonds through years of their children attending school together and participating in community activities such as Special Olympics and summer camps.”

Families want to explore pooling their resources so that their children can live together in homes of their own and in communities where they work, volunteer and participate in community activities. “Unfortunately, this does not currently happen, given the waiting list and the method for locating residential openings for people,” said Ms. Murray.

“Sadly, the current system discourages innovation,” said Ms. Blanco. “Families cannot try new approaches, and worse yet, they generally cannot contribute financially to a loved one receiving government funding without risking the loss of that funding.”

Achieva is working with the Pennsylvania’s Office of Developmental Programs to change policies and regulations to allow and encourage families to create public/private partnerships to blend funding and create opportunities for people with disabilities to move out to their own home. The Pittsburgh Foundation has supported A Home of My Own with a \$50,000 one-year grant, joining other foundation, corporate and individual supporters of the initiative.

“An investment in A Home of My Own to reduce the waiting list is an investment in the future well being of individuals with disabilities and their families,” said Ms. Murray. “Together we can forge a positive and productive future for these individuals and the communities in which they reside.”

“MORE AND MORE PEOPLE WITH INTELLECTUAL AND DEVELOPMENTAL DISABILITIES ARE WAITING LONGER AND LONGER FOR THE BASIC SERVICES THAT THEY NEED TO LIVE SAFELY IN THEIR HOMES. A HOME OF MY OWN CONNECTS FAMILIES AND GROUPS OF FAMILIES WITH PRIVATE AND PUBLIC RESOURCES TO GIVE A PERSON WITH DISABILITIES THE ABILITY TO MOVE FROM A FAMILY HOME AND LIVE INDEPENDENTLY.”

Marsha Blanco
President and CEO
Achieva

ON APRIL 4, 2009, three Pittsburgh police officers were shot and killed while responding to a domestic call in Stanton Heights. The deaths of Stephen Mayhle, Eric Kelly and Paul Sciuлло II marked the first time the city had lost three officers on the same call.

As a lasting tribute to all three, the family of one of the officers who died, Paul Sciuлло, established a special fund at The Pittsburgh Foundation to build and maintain a memorial honoring all fallen officers together with those in branches of public safety.

Eight months and two days after Stanton Heights tragedy, Penn Hills police officer Michael Crawshaw was shot to death after responding to a 911 call at a Penn Hills home. In his memory, his friends and family established a fund at the Foundation to provide scholarships for local students.

In the aftermath of these incidents, relatives, police and the city as a whole mourned, and juries ultimately returned guilty verdicts for both killers. But those who knew the fallen officers decided that their stories should not end there. Here we profile the funds created at the Foundation in their honor.

BUILDING LASTING TRIBUTES TO OUR COMMUNITY'S FALLEN HEROES

“PEOPLE WERE INCREDIBLY GENEROUS—PEOPLE WHO DIDN’T HAVE MONEY. WE FINISHED THE MEMORIAL, DID THE GROUNDS, DID THE PLAQUES AND THE STATUE OF ST. MICHAEL—IT ALL CAME TOGETHER, AND IT’S A BEAUTIFUL TRIBUTE TO THESE OFFICERS.”

Bill Garrison

PERMANENT MEMORIAL FOR THE FALLEN HEROES FUND

In sports, and in life in general, things came naturally to Paul J. Sciallo II. An all-star in baseball, he decided he didn’t like the sport and took up hockey and golf, becoming captain of both teams at Central Catholic and being the second athlete in the school’s history to have his number retired. The first was Dan Marino.

“Let me put it this way,” said his father Paul Sciallo. “We never bragged about our son when he was living — we let other people brag. He was an all-around kid — everybody just loved the kid.” And his mother Julia added: “When you ask us about Paul, we’ll just go on and on. We tell people that when they’ve heard enough, ‘just get up and leave. We won’t be offended.’ Paul was the love of our life.”

The happy young man’s sense of quiet confidence and his friendly, caring personality led him to decide after a stint with Mellon Bank to become a police officer. He wanted to make a difference with his life.

“At the funeral home, people he had arrested came in, because he was so nice to them,” said Mr. Sciallo’s first cousin Bill Garrison. “He had treated them with dignity.”

Mr. Garrison and others decided that the legacy of Sciallo and his fallen comrades should live on, and they created the “Permanent Memorial for the Fallen Heroes Fund” at The Pittsburgh Foundation to ensure that it did.

They decided to build a memorial that would honor not just fallen police officers, but those in all branches of public safety in the city. They enlisted sculptor James Simon and began raising money through bake sales and other means. They went through the long process of getting city approval for the monument, which was planned for Bloomfield, the neighborhood where Sciallo grew up and lived, down the street from his parents. With the memorial costing more than expected and fundraising still short of the goal, Mr. Garrison and local musician Bill Deasy wrote a song, which Mr. Deasy performed to bridge the gap.

“People were incredibly generous — people who didn’t have money,” said Mr. Garrison. “We finished the memorial, did the grounds, did the plaques and the statue of St. Michael — it all came together, and it’s a beautiful tribute to these officers.”

Mr. Garrison has worked closely with The Pittsburgh Foundation through his advertising agency Garrison Hughes, and he knew where to turn in setting up The

Fallen Heroes Fund. “It’s just amazing what they do with these funds — how the money grows over time and keeps giving back to these causes,” Mr. Garrison said. “We went with The Pittsburgh Foundation so we could maintain and beautify this memorial forever.”

MICHAEL J. CRAWSHAW MEMORIAL FUND

At Shaler Area High School almost 20 years ago, there was a group of ten young men whose friendship was strong enough to survive the test of time. They remained close after college and as their lives changed.

When one of them, Penn Hills police officer Michael Crawshaw, was killed in the line of duty, the others came together. The photo of Officer Crawshaw in the papers showed a tough-looking cop. And, while the friends didn’t doubt Officer Crawshaw could be tough when necessary, they knew his other sides. And they wanted those aspects of their friend to be remembered.

“Mike was kind of quiet and reserved at first,” said his friend Andrew Broderick, who runs the casualty unit in the Pittsburgh offices of Marsh USA, an insurance broker and risk advisor. “But he was infamous for one-liners — borderline uncalled for but extremely funny. He wasn’t always going to be the life of the party, but he was always up for doing things. He was very accepting, a great friend and very loyal. Yes, his death was tragic, and yes, it was awful, but Mike had 32 great years. We decided to concentrate on the great things he’s done.”

The group has held two fundraisers a year — a spaghetti dinner with games and raffles typically in the spring or summer and a fall golf outing. And each year, they’ve exceeded their goals, with the help of people and local businesses making donations and supporting the efforts.

“The first year, you’re really running on emotion, but to keep that up every year, it’s an awesome feeling to be part of that,” said Mr. Broderick.

The money has gone into the Michael J. Crawshaw Memorial Fund at The Pittsburgh Foundation, and so far the proceeds are helping a variety of efforts that were part of Crawshaw’s life.

The Fund has given partial scholarships to Shaler Area High School students who want to pursue careers in criminology. It has supported Shaler Township parks and recreation efforts to maintain and support the athletic fields, now known as Michael J. Crawshaw Memorial Fields. And the Fund has created a memorial monument on the field where the friends all played baseball together; the marble memorial with a bench is off to the side of home plate and has photographs of Crawshaw.

Working with The Pittsburgh Foundation has been a big help,” Mr. Broderick said. The Foundation was very supportive throughout and enabled us to accomplish what we set out to do. They have worked behind the scenes to make it happen.”

“OUR FUNDRAISING FOR 2012 WAS OUTSTANDING, AND ALL THE MORE REMARKABLE IN THAT WE HAVE CONSISTENTLY BROKEN OUR ANNUAL RECORDS IN AN ECONOMIC CLIMATE THAT HAS BEEN LESS THAN FAVORABLE. I AM SURPRISED AND DELIGHTED.” Grant Oliphant, President and CEO, The Pittsburgh Foundation

FOUNDATION SETS THIRD SUCCESSIVE ANNUAL FUNDRAISING RECORD: MORE THAN \$65 MILLION RAISED IN 2012

STRENGTHENED PARTNERSHIPS with the region’s professional advisors, estate trust attorneys and CPAs together with continued growth in local charitable giving helped The Pittsburgh Foundation to achieve its third successive record annual fundraising year in 2012.

Overall, the Foundation raised more than \$65 million in 2012, an increase of almost eight percent compared with the previous year’s \$60.4 million, and further surpassing the \$52.8 million raised in 2010 which both set annual fundraising records for the organization.

The Foundation’s growth in fundraising last year exceeded the 6.7 percent growth in charitable giving nationally in 2012, according to Atlas of Giving, the agency that measures and forecasts philanthropic giving in the United States.

“Our fundraising for 2012 was outstanding, and all the more remarkable in that we have consistently broken our annual records in an economic climate that has been less than favorable,” said Grant Oliphant, the Foundation’s President and CEO. “I am surprised and delighted. I am especially pleased at our team’s success in expanding and further strengthening our targeted outreach to professional advisors to the benefit of all involved and most of all to our broad community.”

Major achievements for the year included the creation of 76 new donor funds with the Foundation, the largest annual total in the organization’s history, taking the total number of individual funds to almost 1,800. This broke the previous record of 75 new funds established in 2007 when financial markets were at their peak and prior to the economic recession.

Of the new funds established in 2012, 31 were referred by local financial advisors who—under a special initiative launched by the Foundation in 2008—are allowed to continue to manage the charitable investments of clients they introduced to the Foundation as new donors, subject to approvals.

These 31 new funds represented a combined value of over \$10 million, with an average fund size of \$329,000. Currently there are now 17 local financial advisors managing pools of donor funds, which in 2012

increased significantly to a total of 154 funds, together valued at more than \$55 million. An additional 14 financial advisors are approved to join the program.

Financial management firms partnering with the Foundation are required to complete a due diligence and approval process and to oversee an investment portfolio of a minimum of \$250,000 comprising one or more funds at the Foundation.

The Foundation continued its strategy to enable the conversions of private family foundations to Family Foundation Funds at The Pittsburgh Foundation, offering a comprehensive range of personalized options and professional expertise as an alternative to the administrative and investment issues of independent management. Last year four private family foundations converted to funds at the Foundation, together valued at \$5.6 million, three of which were referred by local professional advisors.

Included in the 2012 results is \$3,175,903 raised by The Pittsburgh Foundation’s affiliate, the Community Foundation of Westmoreland County (CFWC), an increase of 71 percent compared with the \$1,856,623 raised in 2011.

In total, The Pittsburgh Foundation received \$11.2 million in gifts from donors and bequests amounted to \$33.2 million, including \$20 million as an additional installment of the approximate \$50 million bequest from the estate of Charles Kaufman, the largest gift in the organization’s history.

“Almost half of our new funds in 2012 were received in the final two months of the year, which was unexpected,” explained Yvonne Maher, the Foundation’s Vice President Development and Donor Services. “It was clear that many people with philanthropic plans were waiting to see the outcome of the Presidential election and anticipated changes to the tax code. But in the end they chose to ignore any uncertainty and decided to give anyway.”

The Pittsburgh Foundation has total assets of approximately \$900 million. In 2012, the organization awarded total grants of \$43.4 million.

WORKING TOGETHER FOR CLIENTS AND THE COMMUNITY



WHEN TWO MAJOR ORGANIZATIONS find a strategy that harnesses their differing strengths and improves service to clients of both, the ingredients exist for a perfect partnership. And for the Pittsburgh offices of Merrill Lynch and The Pittsburgh Foundation, this is exactly what's happened—a partnership that is increasing the ability of clients to achieve their goals.

“Our clients have many goals and interests,” said Susan Cruz, Managing Director of the Pittsburgh Area Merrill Lynch offices. “Stocks and bonds are part of it, but when you really peel the onion, people are interested in what their money does for them, for their family and for their community. What does it mean for the legacy they want to leave behind?”

“The Pittsburgh Foundation’s donors are interested in those same types of things. So there are times when we have a common interest or a common client. Sometimes clients will tell us they want to work with The Pittsburgh Foundation. It’s a natural crossroads—the intersection of where our clients and the community and The Pittsburgh Foundation all come together. Pittsburghers are proud of their community being the most philanthropic city in the country. And working with The Pittsburgh Foundation is, for us, a natural collaboration and sharing of intellectual property.”

One of the responsibilities of Merrill Lynch Wealth Structuring Trust Specialist Jeremy Floberg is educating the firm’s financial advisors on various philanthropic strategies that might help their clients. And working with The Pittsburgh Foundation has been a key part of that effort. “The Foundation has been great to work with,” Mr. Floberg said. “They spend time going over the details of those strategies with the advisors—and on how they might best serve clients.”

Often Merrill Lynch clients have a long-term professional relationship with their advisor, and they want to see that financial expertise continue with funds they donate to the Foundation. To that end, in the past few years Merrill Lynch and The Pittsburgh Foundation have developed an innovative strategy that has reinvigorated their partnership.

The Pittsburgh Foundation is now pooling the assets of some donor-advised funds in order to have them invested together. Merrill Lynch, working with Foundation’s investment office, creates an investment strategy and manages the combined funds. Finally, the Foundation takes care of doing a separate accounting for each of the donor-advised funds comprising these pooled accounts.

“That is a very important factor for us,” Mr. Floberg said. “This innovation is what allowed our partnership with The Pittsburgh Foundation to become even stronger.”

Having an organizational leader like Ms. Cruz, who believes in the value of charitable giving, is very important to The Pittsburgh Foundation. That belief creates ambassadors for the Foundation throughout the Merrill Lynch team, when the situation is appropriate.

“What I like about our relationship with The Pittsburgh Foundation is that it’s so broad-based,” Ms. Cruz said. “If a client is letting us know that, as part of their legacy planning, they want to have an impact in the community and are interested in The Pittsburgh Foundation, it’s a great opportunity for the client.”

“The Pittsburgh Foundation touches so much. They have a broad perspective and understand what’s going on in the community, and so we’re able to provide a service for the community and the client. The Foundation does a phenomenal job and takes great care of our clients. The client has to be at the center of every single thing we do. And the Foundation is absolutely right there on that.”

“WHAT I LIKE ABOUT OUR RELATIONSHIP WITH THE PITTSBURGH FOUNDATION IS THAT IT’S SO BROAD-BASED. IF A CLIENT IS LETTING US KNOW THAT, AS PART OF THEIR LEGACY PLANNING, THEY WANT TO HAVE AN IMPACT IN THE COMMUNITY AND ARE INTERESTED IN THE PITTSBURGH FOUNDATION, IT’S A GREAT OPPORTUNITY FOR THE CLIENT.”

Susan Cruz
Managing Director
Pittsburgh Area
Merrill Lynch Offices



Susan Cruz and Jeremy Floberg



FOCUS ON WESTMORELAND:

JIM AND BETTY MORRISON: EDUCATION IS THE FUTURE

JIM AND BETTY MORRISON love to travel, appreciate natural beauty and care very deeply about the future of young people.

Their home reflects this all. Perched on a hill overlooking a 1.3 acre wooded ravine, it's surrounded by an extensive garden of native plants and trees. Inside, the story is told through a fascinating display of artifacts and art.

But their favorite spot is the hearth of their home where they've assembled a gallery of photographs with the smiling faces of the students they have come to know and follow through the years. Folded notes are tucked under some, heartfelt expressions of thanks from the young people for the kindness and caring they've shown.

"We have so many children and grandchildren you wouldn't believe it," says Betty.

The Morrisons believe in squeezing all they can from life. Jim had a successful career in advertising as an illustrator and writer. He worked for Ketchum, MacLeod & Grove for 20 years, retiring as vice president in 1986.

He is a veteran of the Navy, having served in WWII. He also served on the board of the Murrysville Foundation, now part of the Community Foundation of Westmoreland County (CFWC). Betty volunteered with the Pittsburgh Council for International Visitors for more than 20 years.

After Jim's retirement, the Morrisons found the time to pursue their favorite activities. Among them is a love of student musical performances and theatre; they have attended nearly every show staged by the Franklin Regional High School in the last 20 years.

They enjoy camping and have traveled to colorful places like Alaska, Norway, New Zealand, Spain and Panama. Native American Indian ceremonies intrigue them as well, and Jim has photographed many extensively. When home, they can be found tending their own woodland park.

The Morrisons frequently invite young people and local garden clubs to tour their garden. Jim instructs the students, Earth Teams from the school district, on the native trees, plants and seedlings growing there, including one of the largest Dawn Redwoods on record in the state. The Pittsburgh Botanical Garden recently included their home on their Open Gardens Tour.

"I've been told it's the prettiest acre and a third in Westmoreland County," says Jim.

Several years ago, the Morrisons decided to create a fund to embody their lifetime of community giving to youth. The James W. and Elizabeth W. Morrison Scholarship Fund was established through CFWC, providing partial academic scholarships to assist Franklin Regional high school graduates in furthering their education.

The scholarships, to begin upon their death, will be awarded each year to four students: a male and female in the arts and a male and female in the sciences in strong academic standing and citizenship. The scholarships require an essay on "the meaning of respect." A committee of community leaders in Murrysville, including the mayor, selects the recipients. The Morrisons invite outside contributions to the fund.

"When you start thinking about what you're going to do with your estate, many ideas come to the fore," Jim explained. We chose to ensure that students from our community receive a good education.

"My philosophy of life can be summed up in six words: You are where you have been," he adds. "The more things you know, the more you get from life. Education is the future."



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IS YOUR PROFESSIONAL OR SOCIAL ORGANIZATION LOOKING FOR PRESENTERS?

Members of the Foundation's Development and Donor Services staff are available to present on a variety of topics related to charitable giving and the work of the Foundation in our community. Presentations can be tailored to your organization's specific needs. Please call Lindsay Aroesty at (412) 394-2606.

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NEW FUNDS

November 1, 2012 – March 31, 2013

Michael T. Abel Memorial Scholarship Fund
Richard and Doris Arnowitz Legacy Fund
Charles H. Austin Fund
Thomas J. and Anna M. Balestrieri Fund
Balog/Bonino Family Fund
John and Frances Beck Family Foundation Fund
BE ME Charitable Fund
BNY Mellon Employee Care Fund
Rev. Ed Bowen Charitable Fund for the Children of Crafton
Bill and Denise Brown Fund
A.H. Burchfield Family Foundation Fund
Milton Burkart and Patricia Crumrine Charitable Trust
Carnegie-Collier Rotary Scholarship Fund
Paul and Buena Craig Memorial Fund
George Davison Fund
Developmental Delay Resources (DDR) Fund
Duerr Family Fund
Sam Duerr Charitable Fund
James Evangelista and Ridwan Lin Charitable Fund

William H. Feller and Edna B. Feller Scholarship Fund
Gabler Family Charitable Fund
Barbara Gengler and Randy Weinberg Fund
Glenn Charitable Trust Fund
Hayes Foundation Fund
Paul Seagrave Heckbert Fund
David and Dawne Hickton Family Fund
Sean and Carol Hughes Fund
Joseph M. and Dorothy A. Jackovic Fund
Ligonier Valley Endowment/Margaret M. Tosh Memorial Fund
Ligonier Valley Endowment Scholarship Fund
Dr. Lucille M. Koehler Fund
Jeff and Erica McLlroy Family Fund
Ross and Carole Nese Fund
Marc Obniski Memorial Scholarship Fund
J & L Oehrle Family Fund
Deacon Palmer/The First Tee of Pittsburgh Endowment Fund
Nick and Marilyn Pavlakovic Charitable Fund

Myles D. Sampson CFWC Operating Endowment Fund
Siewiorek Walker Family Fund
Sylvia and Martin Snow Charitable Foundation Fund
Tepe Family Fund
Kermit B. Thomas Cambria County Historical Society Museum Fund
Kermit B. Thomas Camp Living Waters Fund
Kermit B. Thomas Christian Home of Johnstown Fund
Kermit B. Thomas Ebensburg Area Clergy Fund
Kermit B. Thomas Mt. Herman Cemetery Fund
Kermit B. Thomas New Day Fund
Kermit B. Thomas Salem Church Fund
Kermit B. Thomas UCC Penn West Conference Fund
Kermit B. Thomas Young People's Community Center Fund
Charles and Sue Turner Fund
Mary Vasilakis Fund
Joanne, Charlie and Bruce Wilder Charitable Trust Fund
Richard and Barbara Wukich Family Fund