

THE PITTSBURGH FOUNDATION **community**
FORUM

SPRING 2010



BIG INCREASES IN HUMAN NEEDS— CRISIS IS NOT OVER

DISTURBING NEW DATA on the human costs of the economic crisis will help inform a strategic review by The Pittsburgh Foundation in collaboration with its funding partners on ways to tackle the acute hardship faced by the region's "working and non-working poor."

The Foundation created the Neighbor-Aid emergency fund in December 2008 to support nonprofit organizations struggling to meet an upsurge in demand from families and individuals as the result of the global recession.

The fund distributed more than \$1 million last year to nonprofits working in the human services sector.

Partners in the initiative included Allegheny Department of Human Services, the United Way of Allegheny County, civic leader Elsie Hillman and other local foundations.

But fresh statistics collated earlier this year by The Forbes Funds, an affiliate of The Pittsburgh Foundation, confirms that the crisis is far from over. Compared with

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WELCOME



This is a photo of Benjamin Harris. Few of you will have heard of him. Mr. Harris passed away in 1952. He was the former President of U.S. Steel's Tubular Products, Inc.

But thanks to his daughter, who established a fund at The Pittsburgh Foundation in 1982 in memory of her father, Mr. Harris' philanthropic spirit lives on—currently in reaching out to the men, women and children suffering in the terrible aftermath of the earthquake in Haiti.

From his fund, The Pittsburgh Foundation last month announced \$65,000 in immediate grants to support the relief effort in Haiti. (See pages 5 and 6).

As a community foundation, The Pittsburgh Foundation rightly concentrates most of our discretionary grantmaking right here at home. But when disaster strikes somewhere else, we believe that one way our community maintains its own health is by reaching out to others who are in desperate need and hardship.

The Pittsburgh Foundation is able to do that because of donors like Benjamin Harris. During his life, one of the issues he cared about deeply was the provision of emergency medical services in developing places, like Haiti. We are honored and privileged to carry forward his spirit of philanthropy.

We think he would be proud of these three grants, all of which were made possible by the fund created in his memory so many years ago. His generosity has reached across the years to benefit people he never met in a land few ever consider but whose needs he anticipated through his selfless philanthropy.

When we talk about the “face of giving” at The Pittsburgh Foundation, this is what we mean. Donors like Benjamin Harris.



Grant Oliphant
President and CEO
The Pittsburgh Foundation

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figures for early 2008—when the impact of the economic downturn was already severe—the new data researched earlier this year shows an increase of 273 percent in the numbers of people seeking rental assistance, food pantry referrals are up 58 percent and the numbers of entire families seeking shelter have grown 83 percent.

Utility assistance requests have increased 195 percent, individuals seeking help in obtaining employment is up 313 percent, and according to United Way's Helpline, calls for assistance have increased overall by 45 percent compared with the same period in 2008.

The new data was researched by The Forbes Funds and is currently being further updated in preparation for a meeting of Neighbor-Aid's Advisory Committee, comprising representatives from all of the funding partners.

“It is clear from the initial research that the residual fall-out from the economic crisis is the dramatic and disturbing growth in the numbers of working poor in our community,” said Kevin Jenkins, the Foundation's Director of Community Initiatives and Senior Program Officer. “These are people who, although they have jobs, are unable to make ends meet. Then there are large numbers of people desperately seeking employment.

“The plain truth is that conditions have not improved significantly for families and individuals even though we are seeing some progress economically.”

Neighbor-Aid has performed effectively, serving as an emergency fund to intervene in the crisis to help shore up the safety net in the local nonprofit sector, he said.

“But we now have to decide whether this is the best vehicle for moving forward or whether we need to develop a more systemic approach, because it is my belief that this is a longer-term and much larger issue which needs immediate and urgent attention,” said Kevin Jenkins.

Detailed discussions on the continuation of Neighbor-Aid and possible new initiatives under consideration by the Foundation in collaboration with regional funding partners will be held at the Advisory Committee meeting.

“The shared mission of the Foundation and our funding partners is to bring urgently needed support to those in our community who are in desperate need in the wake of the economic crisis,” said Kevin Jenkins. “I am confident that together we can quickly evaluate those needs and respond effectively with an action plan designed to work with human services nonprofit organizations that clearly are still struggling to cope with extraordinary demand for essential services.”



Catholic Charities

“It is clear from the initial research that the residual fall-out from the economic crisis is the dramatic and disturbing growth in the numbers of working poor in our community. These are people who, although they have jobs, are unable to make ends meet. Then there are large numbers of people desperately seeking employment.”

Kevin Jenkins, the Foundation's Director of Community Initiatives and Senior Program Officer.



FOUNDATION AWARDS GRANTS OF \$65,000 TO **HAITI'S** EMERGENCY RELIEF EFFORT

THE PITTSBURGH FOUNDATION announced grants of \$65,000 to organizations, some with strong local connections, that are supporting the Haiti emergency relief effort.

Hôpital Albert Schweitzer was awarded \$35,000 and Brother's Brother and Doctors without Borders were each awarded \$15,000 following approval by members of the Foundation's Board of Directors.

Funding for the grants came from a fund established in memory of a donor Mr. Benjamin Harris, former President of U.S. Steel's Tubular Products, Inc., who passed away in 1952. The fund, established at the Foundation in 1982 following the death of his daughter, Mrs. Elizabeth Harris Brainerd, is currently valued at more than \$1.4 million and forms part of the Foundation's pool for discretionary grantmaking.

“We are entrusted to carry forward the spirit of Benjamin Harris’s philanthropy and the provision of emergency medical services in developing places like Haiti was an issue about which he cared deeply,” said Grant Oliphant, the Foundation’s President and CEO.

“When we talk about ‘the face of giving’ at the Foundation this is what we mean—donors like Benjamin Harris for whom lasting legacies are created to benefit the needy and the less fortunate.”

Hôpital Albert Schweitzer, located 40 miles north west of Port-au-Prince, the Haitian capital, withstood the catastrophic earthquake and is operating with full staff to treat casualties and provide life-saving care. The facility was founded in 1956 by Pittsburgh native, Dr. Larimer and Gwen Grant Mellon, inspired by the work of Albert Schweitzer.

Brother’s Brother, located on Pittsburgh’s North Side is amassing urgently-needed medical supplies for shipment to Haiti, including antibiotics, surgical packs, surgical instruments and other requested provisions. Its first shipment airlifted to Haiti in the aftermath of the catastrophe was escorted by Dr. Chip Lambert, Medical Director with Brother’s Brother.

Doctors without Borders is an international humanitarian organization which receives strong support from medical professionals in the Pittsburgh region. The organization’s facilities in Haiti were severely damaged by the earthquake, but staffs established temporary clinics to treat the injured.

“As a community foundation our primary focus for discretionary grantmaking is rightly our local region,” said Grant Oliphant. “But when a disaster strikes somewhere else we, like many of our donors, see a role for us in reaching out to others who are in desperate need and hardship.”

“WHEN A DISASTER STRIKES SOMEWHERE ELSE WE, LIKE MANY OF OUR DONORS, SEE A ROLE FOR US IN REACHING OUT TO OTHERS WHO ARE IN DESPERATE NEED AND HARDSHIP.”

Grant Oliphant, President and CEO, The Pittsburgh Foundation

PITTSBURGHGIVES SUPPORTS LOCAL ORGANIZATIONS RESPONDING TO HAITI DISASTER

PITTSBURGHGIVES, The Pittsburgh Foundation’s on-line giving resource, became an on-line portal for donations to support Pittsburgh-based organizations responding to the January earthquake disaster in Haiti.

The site was put into action in the days after the earthquake, enabling the public to make donations to four organizations: Hôpital Albert Schweitzer, Global Links, Brother’s Brother Foundation, and American Red Cross of Southwestern PA.

The Foundation provided added assistance by covering all credit card processing fees on the site. Donations made through the site will go directly to the four organizations. By mid February, public donations to the relief effort on PittsburghGives totaled more than \$15,000.

In addition to the Foundation’s grants and support received through PittsburghGives, individual donors have contributed more than \$37,000 from their funds at the Foundation to various relief organizations that are providing emergency aid in Haiti.

The PittsburghGives site can be accessed at: pittsburghgives.org.



To the right is a snapshot of the organizations and their efforts in Haiti.



HÔPITAL ALBERT SCHWEITZER

Hôpital Albert Schweitzer Haiti is located 40 miles north west of Port-Au-Prince. The hospital withstood the recent devastating earthquake and operated with full staff to help victims. With expertise developed over its 54-year history, Hôpital Albert Schweitzer was one of the few institutions positioned to provide timely hospital care for the injured. The facility was founded in 1956 by Pittsburgh native, Dr. Larimer and Gwen Grant Mellon, inspired by the work of Albert Schweitzer.

The hospital continues to provide on-going care. The earthquake and its aftermath pushed the organization’s resources to the breaking point. The organization worked with another Pittsburgh-based organization, Global Links, to organize emergency relief supplies.

GLOBAL LINKS

Global Links, founded in 1989, collaborates with U.S. institutions to recover surplus medical materials before they end up in land-fills. The materials are then made available to hospitals abroad, including developing nations such as Haiti.

Global Links worked with Hôpital Albert Schweitzer and UPMC to speed medical response. Coordinating with the hospital’s staff as well as local physicians that were deploying with other disaster relief organizations, the organization procured donations of much-needed medical materials, medicines and equipment.

UPMC donated \$50,000 of critically needed antibiotics and other medications for the Global Links shipment.

BROTHER’S BROTHER FOUNDATION

Brother’s Brother, located on Pittsburgh’s North Side is amassing urgently-needed medical supplies for shipment to Haiti, including antibiotics, surgical packs, surgical instruments and other requested provisions. Its first shipment airlifted to Haiti was escorted by Dr. Chip Lambert, Medical Director with Brother’s Brother.

Brother’s Brother mobilized volunteers to collect items such as tooth paste, tooth brushes, wash cloths, and other personal items in white construction buckets found at Home Depot and Lowes. The buckets were then sealed and loaded onto tractor trailers. Every few days a trailer would leave the warehouse en-route for an aid plane destined for Haiti.

AMERICAN RED CROSS OF SOUTHWESTERN PA

Since the earthquake, the American Red Cross has raised approximately \$255 million for the Haiti relief and recovery efforts. The organization recently released a one month Haiti progress report.

To date, the organization has spent or committed \$80 million, with approximately 69 percent of the funds spent or committed for food and water; 20 percent for shelter; and 11 percent for health and family services. As the response progresses and recovery begins, the Red Cross will continue to support these priority areas and longer-term assistance initiatives.

It is clear that what took minutes to destroy will take many years and collective support to help rebuild. However, with the extraordinary support from the people of Pittsburgh, these four organizations will continue to play an important role in relief efforts in the months ahead.

Left: Brother’s Brother Foundation Right: Global Links



THE PITTSBURGH FOUNDATION'S SECOND VOICES OF YOUTH ENCOURAGES YOUTH TO MAKE CHANGE

THE PITTSBURGH FOUNDATION launched the second in its series of public on-line grants competitions, *Voices of Youth*, giving youth an opportunity to have their voices heard about issues in their community.

The latest initiative in a three-part series developed jointly with The Grable Foundation asks children and youth to take action on issues that affect their lives.

“Young people have first-hand knowledge of the conditions that impact their daily lives, yet in most contexts they are not given the opportunity to speak out or take action that leads to meaningful change,” said Jeanne Pearlman, Senior Vice President, Program & Policy at The Pittsburgh Foundation.

Participating children and youth were asked to work with adult mentors to design a project that increases awareness regarding a local, regional, or national issue, engages youth in philanthropic activities that connect them with the causes they support or expands opportunities for young people to learn about movements for change and put those lessons into an action plan for change.

“This initiative is designed to engage youth in our community on issues that are meaningful and significant for them,” said Grant Oliphant, The Pittsburgh Foundation’s President and CEO. “It provides a forum for youngsters to express ideas and opinions which we hope will inspire change that will benefit our community as a whole.”

The contest received over 35 submissions, and a committee of experts, including Grable’s Community Cabinet members, narrowed down to seven finalists. The public will choose three winners in online voting. Each winner will receive \$15,000 to make their project happen.

Finalist’s projects can be viewed at <http://www.pghvoicesofyouth.com>. Winners will be announced on the site shortly (public voting was closing as this edition of *Community Forum* was going to press).

The first *Voices of Youth* competition, Art in Public, was held in 2009. Public voting selected two winners to create a public art project in Pittsburgh. The Children’s Museum of Pittsburgh and UNICEF will collaborate on the creation of a youth video project. The North Side Collaborative will create maps as a tool for youth to initiate conversations about their community and lives.

Both projects are progressing and regular updates will be posted on the *Voices of Youth* website. A third *Voices of Youth* competition will be held in the spring of 2010.

THE SEVEN FINALISTS

Extreme Home Makeover, Steel Valley Edition

120 students from the Steel Valley School District will renovate local homes in Homestead, Munhall and West Homestead. The project is designed to have students and residents gain a sense of pride in their community and maintain better living conditions for the future.

Unified for Youth Extension Group

Seeking to counter the negative effects of homophobia, students will be trained to speak to school administrators, teachers, elected officials and other community members on how to begin change and best implement existing and future policy. The program aims to allow teens the chance to grow up feeling safe and succeed in school.

Speak Up Oliver High School

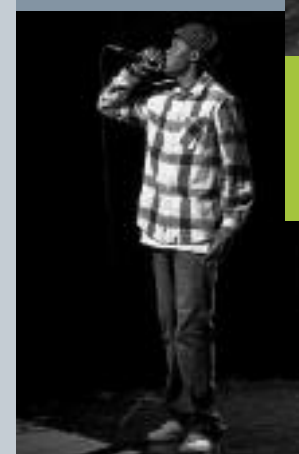
“Speak Up” is an anonymous text messaging system to address violence in the community. Proposed by Oliver High School students, the system will allow students to text if they see a gun in school. The text then alerts the local police department, who can then respond to the incident.



Youth Creating Change.

“Get Ur Good On” Academy Charter School Day of Service

The Academy Charter School is a school designed specifically for Pittsburgh Public High School students on probation from the Allegheny County Juvenile Courts. These students have begun to participate in community service programs. “Get Ur Good On” is designed to celebrate and grow these programs, providing students with opportunities to serve and be leaders in their communities.



Building Peace Through the Arts



Breaking Barriers, Building Tolerance



Extreme Home Makeover

Millvale Children’s Library

Millvale has never had a library, and building one has long been supported by residents of all ages. This plan for change would not only help build a functional children’s library in the Millvale community, but will also bring many people, including teens, to help out.

Breaking Barriers, Building Tolerance

A group of students will be asked to explore the issue of tolerance. Armed with a Flip Video Camcorder, the students will capture moments of their lives and monologues of their thoughts. The videos will be compiled onto an online community to encourage tolerance in the Pittsburgh region.

Building Peace Through the Arts

Tackling the issue of violence in the Sto-Rox community, the project seeks to bring change by involving students in talking about peace. From these discussions, the students will create a work of art that represents peace and will serve as a constant inspiration in the community.



Speak Up Oliver High School

ADVISOR PROFILE: JONATHAN "JON" M. SCHMERLING



Jonathan Schmerling is a Director at Cohen and Grigsby, P.C., a full service Pittsburgh law firm, and is also Chair of the firm's Estates and Trusts Group. With nearly thirty years of experience in estate planning, taxation and charitable giving, he works with clients to assist them in choosing philanthropic options to meet their expressed needs and goals.

Jon has worked with The Pittsburgh Foundation since moving to Pittsburgh in 1980, describing his experiences with the

Foundation as "first rate" and the staff as responsible and knowledgeable.

Jon works to understand his clients, their families, their assets, and what they are seeking to accomplish in their charitable and estate planning goals. "While there are also many tax considerations and nuances, it is not much more complicated than that," he added. "Listening to and understanding what they want is the key as an estate planner."

With his client's needs in mind, Jon explains estate planning options that can accomplish their goals and are the right fit for their expressed needs. "By putting these options in front of my clients, they can make a decision on what is the best fit for them," Jon said.

"The Pittsburgh Foundation is a great option for those who wish to set up an endowment that will last in perpetuity. Clients can choose this option, rather than establishing a private foundation or giving directly to a charity if doing so will best meet their needs."

Jon believes there are other benefits to establishing a fund at The Pittsburgh Foundation. "There are lots of wonderful charitable organizations to support," he explained. "Sometimes a client doesn't realize that if you want to benefit a particular area such as education, the alleviation of poverty, or a particular geographic area; a fund at the Foundation will allow you to benefit multiple charitable organizations in that area of interest, not just one."

DONORCENTRAL:

ACCESS YOUR FUND INFORMATION MORE FREQUENTLY

THE PITTSBURGH FOUNDATION has moved to monthly fund status reports. Beginning in May 2010, you can view your fund's market value monthly, by logging into the DonorCentral website. If you have not signed up to use DonorCentral please contact Willa Dukes at dukesw@pghfdn.org or (412) 391-5122 in order to receive a user ID and password.

JEFFERSON AWARDS

Rewarding Pittsburgh's community service volunteers



Fifty honorees will be recognized next month as one of Pittsburgh's biggest gatherings of community service volunteers come together at Carnegie Music Hall for the annual Jefferson Awards presentations.

They were selected by a community judging panel from more than 150 Award nominations received during 2009, and each will receive a bronze Jefferson Award medallion.

Of the 50 honorees, six have been selected as Jefferson Award finalists by a committee of 10 representatives from the local public and private sectors. In addition to a medallion each will also receive \$1,000 for the nonprofit organization of his or her choice, and one will be chosen to carry Pittsburgh's flag of volunteerism to the national Jefferson Awards that will be judged over two days in Washington, D.C. in June.

The national Jefferson Awards program was launched in 1972 by the American Institute for Public Service to recognize those who perform remarkable deeds in community service without expectation of reward or recognition. Six years later, in 1978, the program was started in Pittsburgh, where it is co-sponsored by The Pittsburgh Foundation, the *Pittsburgh Post-Gazette*, The Heinz Endowments and Highmark.

The six 2009 Jefferson Award finalists are: Marilyn Long and Elizabeth Albright of Lydia's Place; Stephen Conti, M.D., of Our Hearts to Your Soles; Dr. Jack Demos of Surgicorps International; Alicia Kozakiewicz of The Alicia Project; Mary Savage of the Pittsburgh Shade Tree Commission and the Friends of Pittsburgh Urban Forest; and Barbara Shore of the Human Services Center Corporation.

In recognition of the exemplary service of our community service volunteers, *Community Forum* will profile each of Pittsburgh's six Jefferson Award winners, starting in this edition with Marilyn Long and Elizabeth Albright, and Stephen Conti.



**MARILYN LONG AND
ELIZABETH ALBRIGHT**

Lydia's Place

Three quarters of women in the Allegheny County Jail are also mothers to children under 16. Most had custody of their children before their arrest, so the effect of this separation on kids is dramatic. But Marilyn Long and Elizabeth Albright help bridge the gap and maintain the bond between mother and child during this difficult time.

Marilyn and Elizabeth are volunteers at Lydia's Place, an organization that helps female offenders and their children in Allegheny County rebuild their lives. These two selfless individuals help facilitate the Mother's Voice

program, a project that allows incarcerated mothers to read and record stories for their children.

After the recordings are made, the CD and book are sent to the children for them to read along and hear special messages from mom. Marilyn and Elizabeth have served the women incarcerated at the Allegheny County Jail at least six hours per month for the past seven years. Their efforts truly help children and mothers to cope with their separation.

For more information about Lydia's Place, visit: lydiasplace.org or call (412) 391-1013.



STEPHEN CONTI, M.D.

Our Hearts to Your Soles

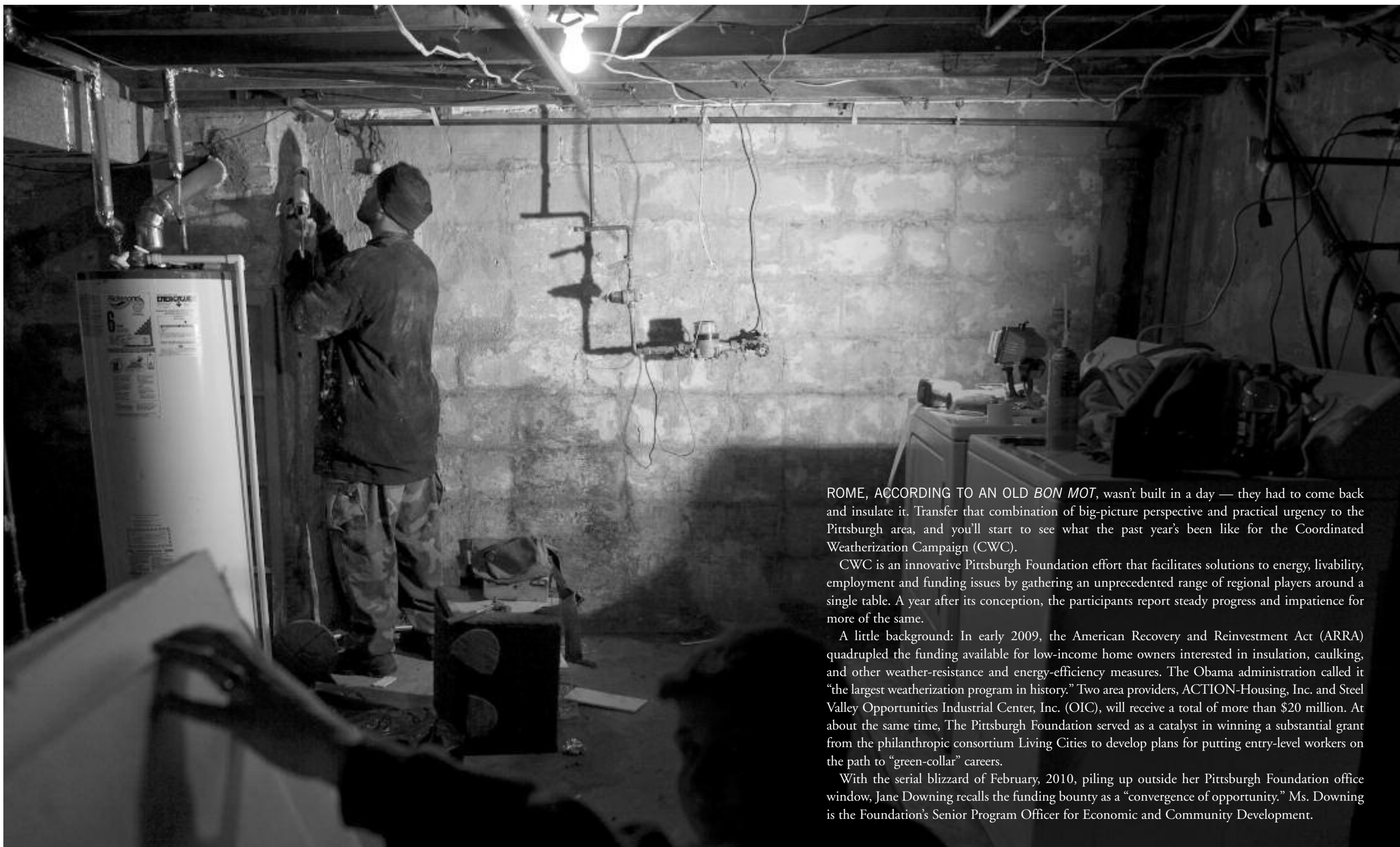
For years, orthopedic surgeon Stephen Conti, M.D., spent the day before Thanksgiving quietly giving away shoes to Pittsburgh's homeless. Through the work of Dr. Conti and his children, Matt and Laura, that effort has grown into a 40-state initiative to serve the needy by providing them with footwear.

Their organization, Our Hearts to Your Soles, began when Matt interned with his father, an orthopedic surgeon at Allegheny General Hospital. Matt began to realize the problems caused by improper footwear, so he began raising money and seeking shoe donations for those in need. As a result, at the group's first event at the Light of Life Ministries on the North Side, 50 men left with new shoes and free orthopedic examinations. Subsequent events expanded into 10 cities around the country through a network of other orthopedic doctors.

Laura Conti made the effort even bigger by obtaining nonprofit status for the organization and partnering with a Nashville-based charity, Soles4Souls, to expand the effort to 40 states. In 2008, the organizations distributed shoes to 4,000 homeless men. Dr. Conti and his children have shown great empathy and generosity, making life a little easier for the homeless. Visit heartstosoles.com for more information.

**HOW TO NOMINATE
AN UNSUNG HERO**

It might be a neighbor, a friend or a family member who dedicates his or her time and never seeks recognition. To nominate a volunteer or to learn more about the Community Champions program call (412) 263-3534.



ROME, ACCORDING TO AN OLD *BON MOT*, wasn't built in a day — they had to come back and insulate it. Transfer that combination of big-picture perspective and practical urgency to the Pittsburgh area, and you'll start to see what the past year's been like for the Coordinated Weatherization Campaign (CWC).

CWC is an innovative Pittsburgh Foundation effort that facilitates solutions to energy, livability, employment and funding issues by gathering an unprecedented range of regional players around a single table. A year after its conception, the participants report steady progress and impatience for more of the same.

A little background: In early 2009, the American Recovery and Reinvestment Act (ARRA) quadrupled the funding available for low-income home owners interested in insulation, caulking, and other weather-resistance and energy-efficiency measures. The Obama administration called it "the largest weatherization program in history." Two area providers, ACTION-Housing, Inc. and Steel Valley Opportunities Industrial Center, Inc. (OIC), will receive a total of more than \$20 million. At about the same time, The Pittsburgh Foundation served as a catalyst in winning a substantial grant from the philanthropic consortium Living Cities to develop plans for putting entry-level workers on the path to "green-collar" careers.

With the serial blizzard of February, 2010, piling up outside her Pittsburgh Foundation office window, Jane Downing recalls the funding bounty as a "convergence of opportunity." Ms. Downing is the Foundation's Senior Program Officer for Economic and Community Development.

A CHANGE IN THE WEATHER

COORDINATED WEATHERIZATION
CAMPAIGN COMPLETES FIRST YEAR
WITH STRONG PARTICIPATION AND SOME
CAREFUL COURSE CORRECTIONS

By George Heidekat

“When the stimulus package was announced, I had been musing on the idea of renewable energy and energy efficiency as job generators to help low-income people move out of poverty. But until I saw how much money was going into weatherization, it wasn’t clear how to operationalize career pathways. Now it seemed that weatherization could be a place to start.

“Meanwhile, I was getting a crash course of my own in home heating. As I got bids for a new furnace, it struck me that many heating-and-cooling people worked in companies out in the suburbs and beyond. But potential workers who live in Homewood—they’re never going to find those companies when new jobs open up.

“So, I thought, how could we make information about weatherization jobs locally based? Maybe, if we set up a community development project, we could do some outreach to eligible homeowners who would create demand for weatherization services and outreach the local contractors who are going to create the jobs to meet this demand. Then they might be willing to hire some local residents. That way we’d meet the intent of the stimulus package and also do good things in the community.”

SNOWBALL EFFECT

But how to introduce the idea to the contractors? As a former board member of ACTION-Housing—which deals broadly with education and employment opportunities as well as housing—Jane knew where to start looking for allies.

ACTION-Housing has been the go-to provider of low-income weatherization services in Allegheny, Greene and Washington Counties for more than 25 years. According to Lindsay Ruprecht, ACTION-Housing’s Sustainable Community Development Coordinator, the response from her network was immediate: “a really big snowball effect.”

Before long, she says, “CWC was leveraged with so many of the region’s environmental conservation efforts, bringing them together to make a greater impact.”

Among those joining ACTION-Housing and OIC around the CWC table today are Community College of Allegheny County and Operating Engineers Local 95, collaborators in training for weatherization installers, crew chiefs and auditors; employment service providers such as CareerLink Pittsburgh, the Labor Management Clearinghouse, and the Minority & Women Education Labor Agency; other non-profits; local governments; regional utility companies; and area foundations.

HIGH HOPES, REALITY CHECKS

Along the way, last year’s ARRA-sparked enthusiasm has occasionally yielded to impatience and disappointment, Ms. Ruprecht concedes.

One of the reasons, she says, is that just mobilizing resources to handle funding at this scale is a big, time-consuming project. (Early last year, *Business Week* suggested [Jan. 29, 2009] that the influx of ARRA funds was so large that federal, state and local agencies would find allocating and overseeing them a challenge.) “The reality is that once the money was actually available, people were really ready to move. But the state has been criticized for taking a while to get the money out the door, and that has made a number of agencies look somewhat unproductive,” she says.

Last year’s high hopes for a quick wave of weatherization jobs have dimmed as well, she says. “CWC really isn’t the big, big job creation program that a lot of people wish it was, although it’s a real employment opportunity for some people.

“At the same time, though, the relationships among the organizations have become much richer and more productive because of CWC. Most of the recent weatherization contractor recruiting that we’ve done has been linked to CWC or The Pittsburgh Foundation. We’ve added seven new minority contractors in the past few months, which is a major boost—we only had 22 total contractors before the stimulus funding came through.”

Ms. Downing agrees that initial job projections were overly optimistic. “CWC has realized that the typical weatherization contractor is a small, efficient business employing just a few people, and that the number of jobs created while ARRA funds are available will be limited.

“But a new, equally important goal has emerged: engaging low-income communities in crafting strategies for reducing energy consumption. In neighborhoods where unemployment is high, the idea of saving energy, even if it’s associated with long-term power cost reductions, can seem hopelessly abstract and complex.

“Now there’s a solution. By working with ACTION-Housing and OIC, community leaders can work to increase weatherization program enrollment while beginning a broader dialogue about how to “green” deteriorated neighborhoods and reduce their carbon footprints,” she says.

For CWC, it’s been a healthy course correction. “In the end, grass-roots communication may turn out to be the most important thing we can contribute. There are so many reasons why people don’t sign up for these programs. If you’re a working single mom, the logistics are daunting. Admitting an energy auditor and then a work crew into your home may not be a comfortable prospect. And—with good reason—people are wary of scams.

“But if we can create a community buzz about weatherization; if there are a lot of people in the neighborhood saying, ‘Take advantage of this. This is the right thing. It’s for all of us. These are experienced and trusted people. There’s all this extra stimulus money now, and it will be gone a year from now ...’

“Just helping with the outreach on weatherization could then start a dialog about other things that could be happening in the neighborhood, like community gardens, or what to do with vacant lots,” she says. “It’s not a straight trajectory, but it is the beginning of a greater and more widespread shift in thinking about how what we can all do to save the planet.”

THE PHILLIPS LEGACY TO BUTLER COUNTY



When Benjamin D. Phillips, Jr. walked into Fidelity Bank for a board meeting in the early 1960s little did Lauretta Greer Coffin know that her life was going to change. Mr. Phillips was the President of T.W. Phillips Gas and Oil Company and Lauretta worked at the bank. “I was hesitant to date him when he asked me out,” she said. “But eventually I agreed and we were married for close to 40 years.”

During those years, Mr. and Mrs. Phillips shared a passion for the Butler community. They were both born and raised in Butler and continued to live there after their marriage. “We were both brought up to care about our neighbors and so we wanted to help people in the Butler community as best we could. It was, and is, the right thing to do,” said Lauretta. When we asked if it was rewarding for her to help others, she said “That’s not the point of giving. If you are concerned about people and their health and welfare, recognition or reward shouldn’t be an issue.”

Lauretta established a fund at The Pittsburgh Foundation in 2009 and has allocated a portion of her estate to grow the fund after her passing. However, the Phillips’ family association with The Pittsburgh Foundation dates back to 1993 when Mr. Phillips established six endowed funds at The Pittsburgh Foundation for Butler County organizations. “We wanted to create funds to help these organizations in perpetuity,” said Lauretta, “We did our research and The Pittsburgh Foundation was our choice.”

Lauretta said she had a similar thought process when finalizing her estate. “I’m not getting any younger you know!” she quipped, “and I wanted to make sure the organizations and community I had grown up and lived in for my entire life, would continue to be supported after I was gone.”

Lauretta consulted with her son and Jonathan M. Schmerling, Esq., Cohen and Grigsby, P.C. (see page 10) and concluded that yet again The Pittsburgh Foundation could provide the investment excellence, oversight and grantmaking expertise to carry out her wishes.

We thank Lauretta for her confidence in us and we plan to live up to the legacy she has created for her family and her community.



“A new, equally important goal has emerged: engaging low-income communities in crafting strategies for reducing energy consumption. In neighborhoods where unemployment is high, the idea of saving energy, even if it’s associated with long-term power cost reductions, can seem hopelessly abstract and complex.”

Jane Downing, the Foundation’s Senior Program Officer for Economic and Community Development



NEW FUNDS FLOURISH DESPITE ECONOMIC DOWNTURN

The Pittsburgh Foundation is delighted to report that—despite the depressed economic conditions last year—our community continued to give generously to support others, many of whom have been experiencing hardship as the result of the global recession.

With the philanthropic sector having predicted a fall-off in charitable giving and reduced grantmaking for 2009, the Foundation's donors continued to grow their endowments providing vital funding streams for nonprofit organizations now and for the future.

The creation of new funds at the Foundation built to a crescendo at the end of last year. In November 2009, 28 new funds had been established and expectations were that the Foundation would end the year with between 40 and 45 new funds. Deferred funds were tracking ahead of expectations as reported in the last edition of *Community Forum*.

However, in a flurry of activity during the final four weeks of 2009, the year's figures increased to:

➤ 53 NEW FUNDS ESTABLISHED

..... achieving the Foundation's target, and

➤ 41 DEFERRED FUNDS CREATED

..... ahead of the year's target of 40.

In terms of dollars, the Foundation closed the year at \$26,661,908, an increase of 13% over the previous year. This number included several significant legacy gifts including a \$10 million bequest from Quentin and Evelyn Cunningham.

"It is clear that the philanthropists who make up The Pittsburgh Foundation care deeply about the needs in our community," said Yvonne Maher, the Foundation's Vice President of Development & Donor Services. "We thank all of our donors for their trust and dedication to the nonprofit community and for continuing to grow their funds and establish new funds at The Pittsburgh Foundation. We were humbled by their kindness in a very difficult year. We look forward to a robust 2010."

ABOUT PLANNED GIVING



UNDERSTANDING YOUR OPTIONS AT THE PITTSBURGH FOUNDATION

ALBERT BAXTER IS UNSURE what first inspired him to consider joining The Pittsburgh Foundation's donor family. "I probably learned about the organization in the newspaper or on the radio," he recalled. "It was a name I recognized but knew little about."

About five years ago he decided to make a call. He had inherited some money from his brother and "I had some of my own," he said, "and I wanted to set up a scholarship for students interested in learning more about the sciences and engineering." Mr. Baxter's career was as an Engineer for the Gulf Research and Development Company.

He named the scholarship after his mother and father "George and Emma Baxter" and he served on a Foundation committee with some of his retired colleagues recommending scholarships to worthy students. After several years as a scholarship, he recommended a change of fund purpose to support the Springdale Free Library where he visited frequently and had served as a board member for many years.

Mr. Baxter explained that since he lives "up the river in Cheswick," invitations to Pittsburgh Foundation events, site visits and educational presentations give him a "good excuse" to come into Pittsburgh, oftentimes with a friend.

It was at a Planned Giving presentation hosted by attorney, Jeff Morella, Esq., Morella & Associates and Chad Frick and Warren Mathe, AXA Advisors that he learned about the benefits of a Charitable Gift Annuity (CGA). Mr. Baxter had recently sold a cottage and he wanted to "do something" to support his library and church. He contacted Jocelyn Thompson, Director of Donor Services and Yvonne Maher, Vice President for Development and Donor Services and asked them to run some calculations for a CGA. "I'm 82," he said, "and I was able to get a 7.5% return on the CGA. In today's market that's fantastic and I am also leaving a little money for some charities that I supported during my lifetime."

When asked what he has learned about the Foundation since he first approached the organization, he said: "The Pittsburgh Foundation is for everyone, not just for big funds. It is a good, solid organization that is in touch with needs in our community, and I'd recommend to people who are charitably inclined to give it more thought."

"I have been very pleased with my experience at The Pittsburgh Foundation and I think there are many others out there just like me who could benefit from making a phone call to learn more."

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ABOUT CHARITABLE GIFT ANNUITIES

A charitable gift annuity is a way to make a gift to The Pittsburgh Foundation, and still receive an income for yourself or others. A donor irrevocably transfers a specific sum of cash, appreciated securities or other property to The Pittsburgh Foundation in return for its promise to pay the donor, another, or both, fixed and guaranteed annual payments for life. The remainder of the Annuity is used to support the donor's fund.

Most Gift Annuity donors are retired, want to increase their cash flow, seek the security of guaranteed payments, and would like to save taxes. A charitable gift annuity could be right for charitably inclined individuals in any of the following circumstances:

- The interest rates on their CDs and other fixed-income investments have declined, and they would like to increase their cash flow.
- They own appreciated stock or mutual fund shares and have considered selling some of the shares and reinvesting the proceeds to generate more income, but they have hesitated because they don't want to pay tax on the capital gain.
- They would like to count on fixed payments, which are unaffected by interest rates and stock prices and which they cannot outlive.
- They would like to provide financial assistance to an elderly parent, a sibling, or other person in a tax-advantaged manner.

EXAMPLE 1

A 75-year-old individual establishing a \$25,000 CGA with cash, might receive the following benefits:

Income for life

6.3% Charitable Gift Annuity (\$25,000 cash)

The annuitant will receive fixed payments in quarterly installments totaling \$1,575 each year for life. In addition, \$1,111.95 of each year's payments will be tax-free for the first 12.4 years.

A Charitable Income Tax Deduction

6.3% Charitable Gift Annuity (\$25,000 cash)

A federal income tax deduction of approximately \$11,220. The deduction may vary modestly depending on the timing of your gift.

Possible Reduction in Probate Costs and Estate Taxes.

Generous Support of a Fund at The Pittsburgh Foundation.

The Pittsburgh Foundation does not provide legal or tax advice and this information should not be construed as such. Please consult your attorney or financial planning professional for all legal and tax questions.

"I PROBABLY LEARNED ABOUT THE PITTSBURGH FOUNDATION IN THE NEWSPAPER OR ON THE RADIO. IT WAS A NAME I RECOGNIZED BUT KNEW LITTLE ABOUT. I WANTED TO SET UP A SCHOLARSHIP FOR STUDENTS INTERESTED IN LEARNING MORE ABOUT THE SCIENCES AND ENGINEERING."

Albert Baxter,
retired Engineer for the Gulf Research
and Development Company.

EXAMPLE 2

An 80-year-old man and his 75-year-old wife establishing a \$100,000 cash Charitable Gift Annuity might receive the following benefits:

Income for life

5.8% Charitable Gift Annuity (\$100,000 cash)

The annuitants will receive fixed payments in quarterly installments totaling \$5,800 each year for life. In addition, \$4,077.40 of each year's payments will be tax-free for the first 14.8 years.

A Charitable Income Tax Deduction

5.8% Charitable Gift Annuity (\$100,000 cash)

You will qualify for a federal income tax deduction of approximately \$39,684. Your deduction may vary modestly depending on the timing of your gift.

Possible Reduction in Probate Costs and Estate Taxes.

Generous Support of a Fund at The Pittsburgh Foundation.

Note: Deductions for gifts of cash and other non-appreciated property will be limited to 50% of your adjusted gross income. You may, if necessary, take unused deductions of this kind on tax returns over the next five years, subject to the same 50% limitation.

PITTSBURGH PROMISE UPDATE:

PARTNERSHIPS ENHANCE COLLEGE APPLICATION AND SCHOLARSHIP PROCESS

THE PITTSBURGH PROMISE in conjunction with the United Way of Allegheny County and NEED, has initiated a new program to assist city high school students applying for Promise scholarships—and their families—with free tax preparation and help completing the Free Application for Federal Student Aid (FAFSA) forms.

These services will be offered free to families with incomes of less than \$52,000 and who have children currently enrolled in their junior or senior years in Pittsburgh Public Schools or city charter schools. Through existing programs by the United Way and NEED, trained volunteers will assist eligible families in completing these necessary forms in time for processing Promise scholarship applications. NEED has long assisted eligible families to complete the FAFSA student aid forms. The Promise requires completion of both FAFSA and the Federal Income Tax Return forms with its scholarship application.

“IN ADDITION TO PROVIDING RELIEF FROM THE COST OF TAX PREPARATION, THIS PROGRAM IS INTENDED TO ELIMINATE ANY BARRIER TO UNDERSTANDING AND TIMING IN COMPLETING THE FEDERAL STUDENT AID FORM AND DETERMINING ELIGIBILITY FOR PROMISE SCHOLARSHIPS.”

Saleem Ghubril, Executive Director, The Pittsburgh Promise



“Last year, volunteers trained by the United Way returned more than \$6.2 million in tax returns to low income families in Allegheny County. This project is a logical extension of that work and we are very excited about it,” said Robert Nelkin, United Way’s President and Chief Professional Officer.

“I’m encouraged by the new seamless innovation with this program that hopefully will increase the number of parents filing their tax returns and assisting with completing their child’s FAFSA,” said Sylvester Pace, President and CEO of NEED.

“This is a helpful benefit to prospective Promise scholarship applicants and their families as they seek funding for education beyond high school,” said Saleem Ghubril, Executive Director of The Pittsburgh Promise. “In addition to providing relief from the cost of tax preparation, this program is intended to eliminate any barrier to understanding and timing in completing the federal student aid form and determining eligibility for Promise scholarships,” added Ghubril.

In an effort to accommodate family schedules to participate in this free program, Saturday workshop sessions were held throughout February at different city school locations. Postcard reminders were mailed to student/family homes announcing the dates, times and locations of these preparation sessions.

More information about this free tax and financial aid preparation program is available at: www.eitcpgh.org or from United Way’s HelpLine at (412) 255-1155.

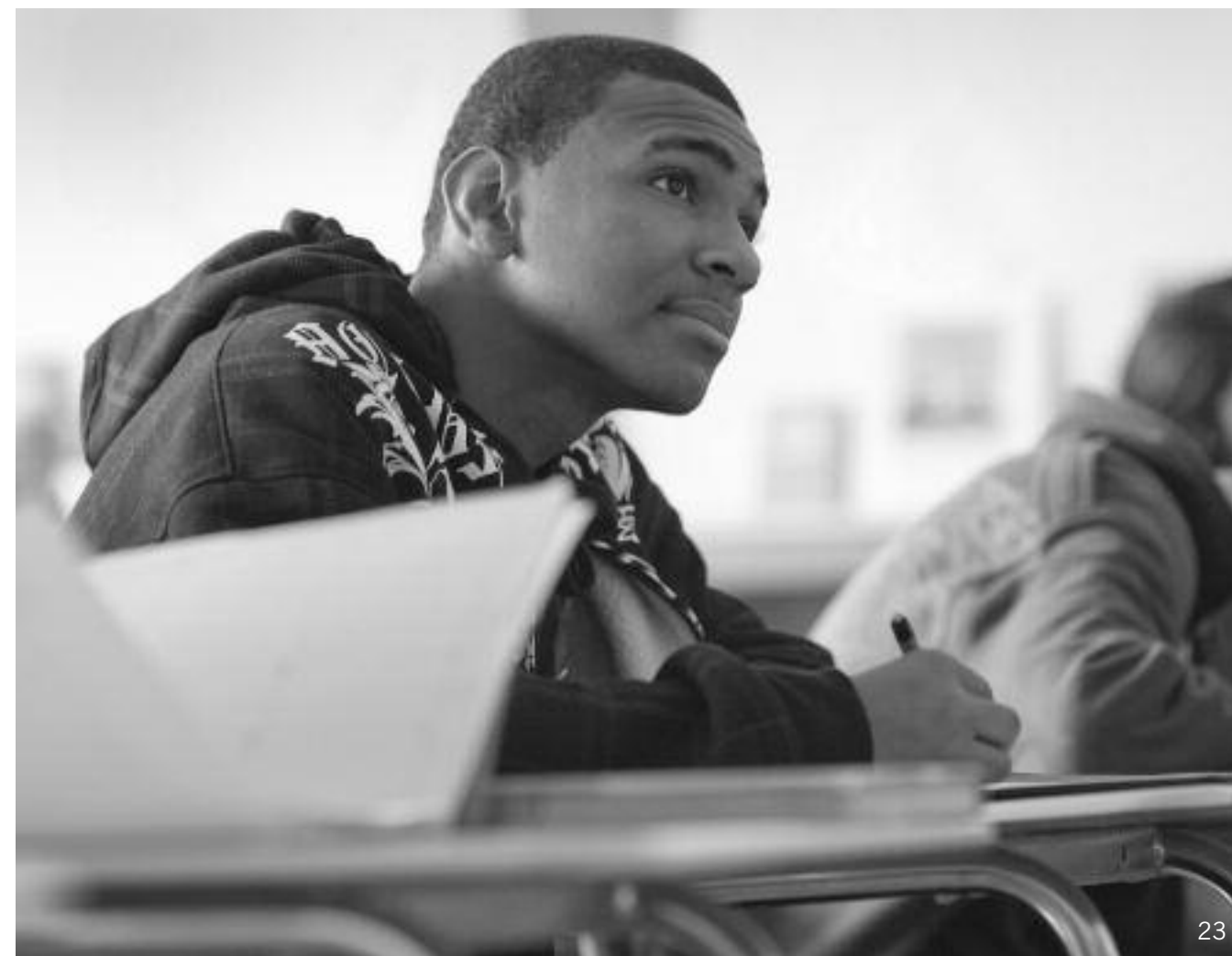
The primary purpose of The Pittsburgh Promise is to help strengthen the economic future of our community, the quality of urban public school education and the future workforce for the region. The Pittsburgh Promise program was established at The Pittsburgh Foundation in December 2007 with a \$100 million commitment from UPMC, including \$20 million to support city school graduates from the classes of 2008 and 2009.

The remaining \$80 million is a challenge grant (\$10 million a year for eight years), intended to spur support and contributions from all sections of the community to raise an additional \$120 million (\$15 million annually for eight years).

The region’s foundation community has also made various multi-year commitments to support this scholarship fund as a key regional economic development initiative. www.pittsburghpromise.org

NEED is designated as an Education Improvement Organization (EIO) through Pennsylvania’s Education Improvement Tax Credit (EITC) and, as a college access program, offers grants, scholarships, mentoring, counseling and internships to help underrepresented, low-income and first-generational youth in college and career opportunities and options.

Since its inception in 1963, NEED has supported approximately 19,000 deserving youth by providing over \$19 million in grant allocations. These grants have helped to empower Pittsburgh’s and the region’s next generation of leaders and to overcome financial, social status, educational and cultural barriers. www.needld.org





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PLEASE SHARE YOUR THOUGHTS AND IDEAS


about issues in which the Foundation is involved and those affecting our community. To submit a letter for publication in *Community Forum*, send it to the Foundation to the attention of Stephanie Higgins, Communications Associate, The Pittsburgh Foundation, Five PPG Place, Pittsburgh PA 15222 or email: higgins@pghfdn.org

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IS YOUR PROFESSIONAL OR SOCIAL ORGANIZATION LOOKING FOR PRESENTERS?

Members of the Development and Donor Services staff of The Pittsburgh Foundation 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 Kristin DeAngelis at (412) 394-2606 for more information.

NEW FUNDS

December 1, 2009 – February 23, 2010

Bashaw Family Fund
John Bruno Scholarship Fund
Leone and Lucille Cavazza Family Fund
Charlton Fund
Robert Cowell Memorial Scholarship Fund
Edward J. and Elizabeth J. Coyne Scholarship Fund
Cranberry Legacy Fund
Edmunds Family Fund
Fund for American Heart Association
Fund for the Cardiovascular Institute
Fund for Grove City College
Fund for Haverford College
Fund for the Hillman Cancer Center
Fund for Magee-Women's Hospital
Breast Cancer Program
Fund for University of Pittsburgh School of Medicine–
Scholarship Program
Fund for the Trinity Evangelical Lutheran Church of Avalon
Alison L. Kost Fund
Jack R. Luskay Memorial Scholarship for
Practicing or Prospective School Librarians
Bill and Jo Meyer Fund
Nine Mile Run Fund
Anthony L. Pasquarelli Fund
Pawling Fund
Robert F. Pusateri and Lynn J. Pusateri Family Fund
Jacob Snively Memorial Scholarship Fund

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