

THE PITTSBURGH FOUNDATION **community**
FORUM SUMMER 2014



LIVE LIKE LOU

Telethon raises awareness and funds in fight against Lou Gehrig's disease.

SEE PAGE 3



NATIONAL SEARCH TO RECRUIT NEW PRESIDENT AND CEO FOR THE PITTSBURGH FOUNDATION

THE PITTSBURGH FOUNDATION is currently undertaking a national executive search in its task to recruit a successor to former President and CEO, Grant Oliphant who last month left the organization to take the position as the new President at The Heinz Endowments.

The move marks his return to the Endowments—the Pittsburgh-based family foundation he previously served for more than 10 years in various senior positions—following six years as head of The Pittsburgh Foundation. Mr. Oliphant succeeds the Endowments' previous President, Bobby Vagt following his retirement earlier this year.

Members of The Pittsburgh Foundation's Board of Directors have been appointed to serve on a special search committee led by Board Chair, Dr. Edie Shapira. A national recruitment firm is assisting with the search.

Dr. Shapira said that the Foundation plans to name its new President and CEO by the fall, 2014. "We will be looking at candidates locally and nationally," said Dr. Shapira. "While our primary focus will fall on southwestern Pennsylvania, our search will extend beyond this region in our efforts to recruit a successor who will continue the transformative and innovative work that has been accomplished so successfully under Grant's tenure.

"Now we look to The Pittsburgh Foundation's future. Thanks to the generosity of our donors and the collaboration of our philanthropic partners over the past six years, the Foundation is the strongest it has ever been in our 69-year history.

"Our major objective is to recruit a dynamic new leader who will build on this great work."

Grant Oliphant acclaimed for his "outstanding" leadership (pages 6/7)


IN THIS ISSUE:



3 LIVE LIKE LOU TELETHON RAISES OVER \$145,000

4 2014 DAY OF GIVING

6 GRANT OLIPHANT ACCLAIMED FOR HIS "OUTSTANDING" LEADERSHIP




8 DONOR PROFILE: THE HARRISON FAMILY

10 90.5 WESA POISED TO EXPAND LOCAL NEWS PROGRAMMING

12 IN MEMORIAM ANDREW FISHER, JACK MCCARTAN, AND JAN VISH



15 ADVISOR PROFILE: THE LOCAL TOUCH Rimmel Mehaffey Pessy Stager Wealth Consulting Group at UBS




FOCUS ON WESTMORELAND:

16 TECHNOLOGY GRANTS



18 DONOR PROFILE: FLORENCE JENKINS



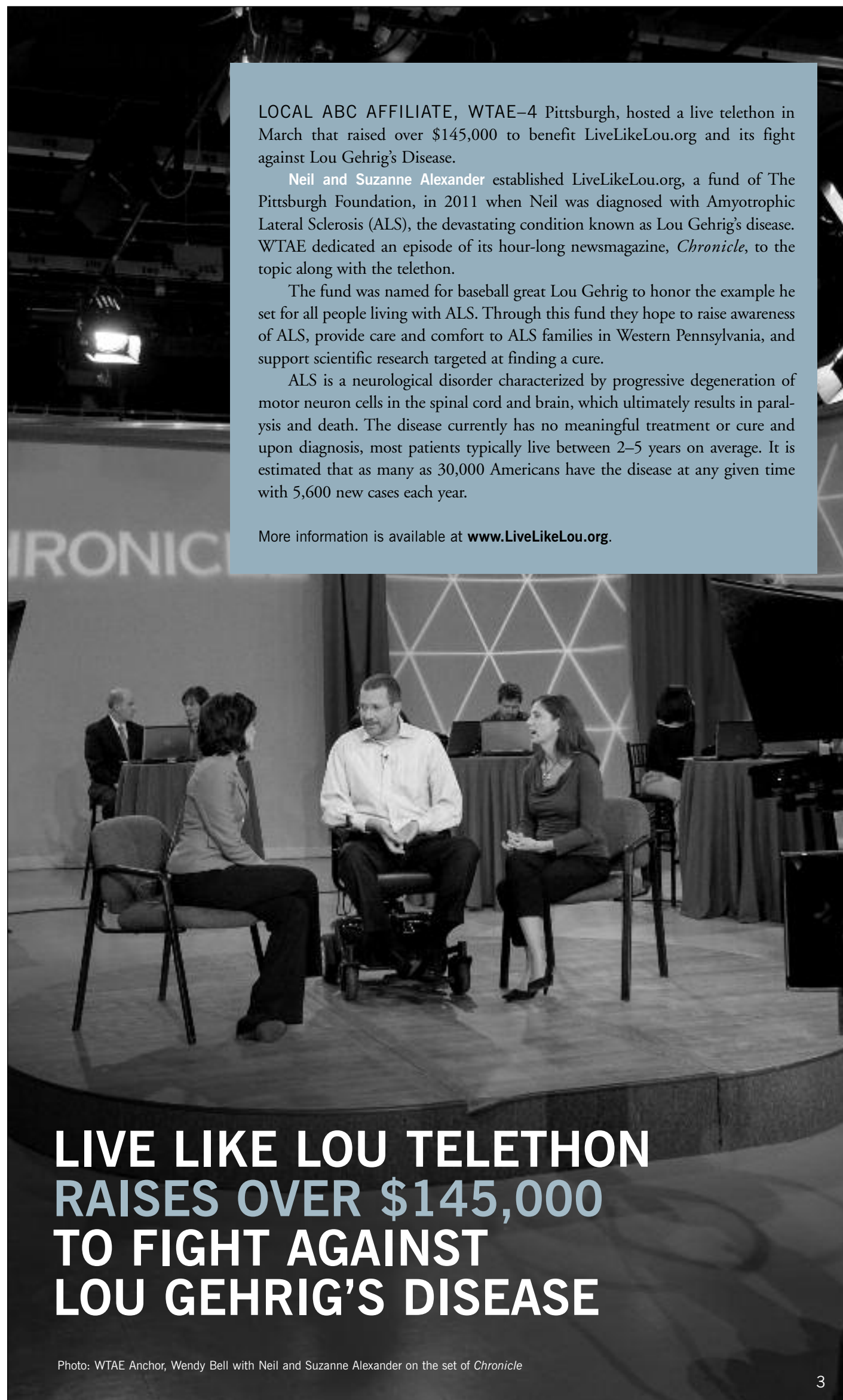
LOCAL ABC AFFILIATE, WTAE-4 Pittsburgh, hosted a live telethon in March that raised over \$145,000 to benefit LiveLikeLou.org and its fight against Lou Gehrig's Disease.

Neil and Suzanne Alexander established LiveLikeLou.org, a fund of The Pittsburgh Foundation, in 2011 when Neil was diagnosed with Amyotrophic Lateral Sclerosis (ALS), the devastating condition known as Lou Gehrig's disease. WTAE dedicated an episode of its hour-long newsmagazine, *Chronicle*, to the topic along with the telethon.

The fund was named for baseball great Lou Gehrig to honor the example he set for all people living with ALS. Through this fund they hope to raise awareness of ALS, provide care and comfort to ALS families in Western Pennsylvania, and support scientific research targeted at finding a cure.

ALS is a neurological disorder characterized by progressive degeneration of motor neuron cells in the spinal cord and brain, which ultimately results in paralysis and death. The disease currently has no meaningful treatment or cure and upon diagnosis, most patients typically live between 2-5 years on average. It is estimated that as many as 30,000 Americans have the disease at any given time with 5,600 new cases each year.

More information is available at www.LiveLikeLou.org.



LIVE LIKE LOU TELETHON RAISES OVER \$145,000 TO FIGHT AGAINST LOU GEHRIG'S DISEASE

Photo: WTAE Anchor, Wendy Bell with Neil and Suzanne Alexander on the set of *Chronicle*

DAY OF GIVING 2014

2014

DAY OF GIVING**RAISES OVER \$5.7 MILLION FOR LOCAL NONPROFITS
INITIATIVE EXCEEDS \$35 MILLION SINCE INCEPTION**

More than \$5.7 million was raised for the region's nonprofit organizations in May with The Pittsburgh Foundation's sixth annual Day of Giving.

The event was moved from its traditional date in the fall to be part of the first ever Give Local America national event organized by the Council on Foundations. Across the U.S., 80 community foundations helped to raise over \$50 million for more than 7,700 charitable organizations.

"Measured against the performances of our colleagues throughout the U.S., Pittsburgh's Day of Giving was an outstanding success," said Grant Oliphant, The Pittsburgh Foundation's President and CEO. "Pittsburgh accounted for more than 11 percent of the total raised nationally and this will provide significant support to the critical work of our nonprofit organizations."

For Pittsburgh, public donations of \$4.9 million were received in an 18-hour period through The Pittsburgh Foundation's on-line PittsburghGives program, taking the total raised since Day of Giving events began in 2009 to more than \$35 million. Together with matching funds for Allegheny, Westmoreland and Butler counties, the total raised exceeded \$5.7 million.

For nonprofits in Allegheny County, individual contributions totaled \$4,500,000, and they will each receive an equal pro-rated share of the \$750,000 matching funds. For Westmoreland, the event received public donations of \$362,000 which share a match pool of \$50,000. Participating in the Day of Giving for the first time, Butler County received public donations of \$73,000 for 27 participating nonprofits and they will each receive an equal pro-rated share of the \$18,500 in matching funds provided by the Endowment for Butler County, a fund of The Pittsburgh Foundation.

A total of 821 local charities in Allegheny, Butler and Westmoreland counties with profiles on the PittsburghGives site, were eligible to receive contributions from donors that qualified for an equal, pro-rated share of the matching funds. This was up from the 729 participating nonprofits in 2013.

Due to its unexpectedly high rate of growth since 2009, The Pittsburgh Foundation introduced minor modifications to the program for 2013. To ensure a robust match percentage for participating nonprofits, the Foundation determined that only the first \$1,000 per individual per organization would be eligible to receive matching dollars from the match pools. In previous years, the cap was \$10,000.

The total raised for Pittsburgh's Day of Giving was below the \$7.7 million raised by the event last year. "We believe this is due primarily to moving the event from its customary date in October when it has served as a kind of local launch for the charitable giving season," said Grant Oliphant.

"It was a clear demonstration of the value of our local Day of Giving and the important role it has played in helping to grow individual giving and support for our region's nonprofits. We congratulate and applaud everyone who gave and the nonprofits that organized themselves so well, again showcasing Pittsburgh's generous spirit."

The PittsburghGives platform serves as a unique platform for nonprofits to demonstrate their work in the community, detailing information about their charitable programs, missions, management and finances. PittsburghGives can be accessed at www.pittsburghgives.org.

The PittsburghGives on-line platform will be used to host a Day of Giving to support local arts programs on October 2, 2014 organized by the Greater Pittsburgh Arts Council.

GRANT OLIPHANT ACCLAIMED FOR HIS “OUTSTANDING” LEADERSHIP AT THE PITTSBURGH FOUNDATION



GRANT OLIPHANT was commended and congratulated for his “immeasurable contributions” to The Pittsburgh Foundation after he was named the new President of The Heinz Endowments.

The former President and CEO of The Pittsburgh Foundation, who joined the organization from the Endowments in February 2008, led a major transformation in the organization over the past six years, said the Foundation’s Board Chair, Dr. Edie Shapira.

This includes the Foundation’s engagement of key constituents, its efficient stewardship and investment strategies and the development of key initiatives to enhance community outreach and maximize grantmaking impact.

“World class talent attracts world class opportunities and Grant Oliphant has both,” said Dr. Shapira. “The Pittsburgh Foundation has been extremely fortunate to have had the benefit of Grant’s leadership. He has brought our organization to new heights of effectiveness, stability, and community leadership.

“He richly deserves this chance to lead The Heinz Endowments. They have chosen well, and so has he. We will dearly miss him, but we look forward to a great partnership with him in his exciting new role. Truly, this is great news for Pittsburgh. We congratulate Grant, the Heinz family, and The Heinz Endowments.”

Mr. Oliphant became the fourth head in The Pittsburgh Foundation’s 69-year history when he moved to the organization from The Heinz Endowments, one of the nation’s leading family foundations. Almost 100 applications were received for the position.

Accomplishments at The Pittsburgh Foundation during Mr. Oliphant’s leadership include the launch of the Pittsburgh Promise scholarship program for the students of the Pittsburgh Public Schools and the development of PittsburghGives, an on-line giving and research portal that has raised more than \$35 million over the past five years for local nonprofits with annual Day of Giving events.

Both of these programs have become national models for similar initiatives by other community foundations across the U.S.

In 2013, The Pittsburgh Foundation exceeded \$1 billion in total assets for the first time in its history, representing asset growth of 37 percent since the end of 2007. Also, last year the Foundation raised almost \$60 million, the third highest in its history and continuing a trend that has seen the organization strengthen its annual fundraising, including successive records set over the previous three years. During his tenure at the Foundation, the number of donor funds has doubled to over 1,900 individual funds.

In 2009, the Foundation achieved a landmark in its history under Mr. Oliphant’s leadership with the formation of the Legacy Fund, creating for the first time the vehicle for the Foundation to invest its own assets. Until that time, the Foundation had delegated its asset management to outside organizations.

Strategic development also included the realignment of the Foundation’s grantmaking and in 2010 the merger of the Foundation with the Community Foundation for Westmoreland County.

“Under Grant’s watch, assets have grown significantly, our grantmaking impact has been enhanced and our role as a community leader and convener has grown dramatically,” said Dr. Shapira. “We thank and congratulate him for his outstanding leadership.”

In announcing Mr. Oliphant’s appointment, Teresa Heinz, Board Chairman of the Endowments, acknowledged his past experience and service to the Endowments and his extraordinary success in leading The Pittsburgh Foundation through a transformative period of growth and community impact.

Accomplishments at The Pittsburgh Foundation during Mr. Oliphant’s leadership include the launch of the Pittsburgh Promise scholarship program for the students of the Pittsburgh Public Schools and the development of PittsburghGives, an on-line giving and research portal that has raised more than \$35 million over the past five years for local nonprofits with annual Day of Giving events.

Both of these programs have become national models for similar initiatives by other community foundations across the U.S.

“I have known Grant for many, many years and watched him grow into an exemplary professional and an exceptional leader, visionary and innovator,” said Teresa Heinz. “Above all he is a caring and compassionate human being who offered us three characteristics that made him the perfect choice for this role. He has a deep understanding of Pittsburgh, an informed and strategic view of philanthropy, and a close personal alignment with our family’s philanthropic and community values. I am delighted that he is returning to lead our vital mission at the Endowments.”

Mr. Oliphant, who served as press secretary to the late U.S. Sen. John Heinz, was asked by Teresa Heinz to assist with the family’s philanthropic work after she assumed the board chairmanships of the family’s foundations following Sen. Heinz’s untimely death in 1991.

“It is fair to say that almost everything I believe about the work of social change and how philanthropy can help a community move forward, I learned in some way or another through my association with the Heinz family. The Heinz Endowments is a true philanthropic leader, locally for the Pittsburgh region, nationally and beyond, with a distinctive and successful track record for addressing big and critical community issues. I have learned from the best, and now to be asked to lead the best is a deeply gratifying honor,” said Mr. Oliphant.

“I am also immensely grateful to The Pittsburgh Foundation, where I have been privileged to work with a remarkable Board and staff who over the past six years have proved that community philanthropy can be a powerful force for change. I look forward to our continued partnership as these two great philanthropic institutions carry forward their shared goal of making Pittsburgh a model of community transformation.”

Mr. Oliphant has taken a prominent role in building advocacy programs to support the work of local nonprofits and the families and individuals they serve. He serves extensively on the boards of local nonprofit and national sector organizations, including the Center for Effective Philanthropy and the Council on Foundations. He is also Chair of the Board of Riverlife, which works to transform Pittsburgh’s riverfronts, and serves on the boards of the Pittsburgh Cultural Trust, Pittsburgh Promise, the Allegheny Conference on Community Development, and the Pittsburgh Advisory Board of the Federal Reserve Bank of Cleveland.

LAST YEAR, IZABELLA HARRISON donated \$500 to Toys for Tots and another \$500 to Children's Hospital of Pittsburgh. She is 5 years old. And it wasn't the first time she donated to local organizations whose work touched her heart.

"She always worries about kids having something at Christmas time," says her grandmother, Linda Harrison.

Izabella isn't the only grandchild to make charitable donations from the family fund John and Linda Harrison of Hampton established in 2012 with the Pittsburgh Foundation. All six of her cousins do so annually using certificates from "grandma" and "Pappy Jack" to designate a charity or two to receive the \$1,000 they each are allowed to give.

DONOR PROFILE:

HARRISON FAMILY ENCOURAGES INTERGENERATIONAL PHILANTHROPY

"We set up the fund so it will go on forever," says John Harrison, 71, a retired engineer who co-owned a company that made electronic safety systems for the railroad industry. "Our children will take care of it when we pass away. But we thought, boy, if we got the grandchildren involved right now it could go on for another generation after that."

The Harrison's use of certificates to acquaint their grandchildren with charitable giving is one of the more creative ways of addressing the intergenerational transfer of wealth, which is an issue of growing importance in philanthropy. As people live longer, family foundations and funds set up decades ago now span the lifetimes of multiple generations.

"In some cases, the children have never been involved in the family's philanthropy. They may not understand what the fund is, what the Pittsburgh Foundation is or what mom and dad wanted to do. And they may not have ever given charitably themselves" says Yvonne Maher, Vice President for Development and Donor Services at The Pittsburgh Foundation. "We as a foundation need to pay attention to this. We're responsible for stewarding the wishes of the parents. So we need to engage the children now."

The Pittsburgh Foundation is addressing the issue in a number of ways. Foundation staff, for example, interview family members and facilitate conversations to help them reach consensus on issues important to the future of their funds, such as family values and legacy. To develop their expertise in such processes, staff underwent training with 21/64, a New York nonprofit that specializes in best practices related to engaging the next generation in family philanthropy.

Other tools are available to help families manage their funds, better understand the needs of the community and decide where to direct their donations. The Foundation publishes a "wish book" every year vetted by a panel of donors that contains specific requests for support from nonprofits involved in a broad range of issues critical to the region. Parents and grandparents use the book to show their children and grandchildren the range of need that exists in the community.

Through the Foundation's Center for Philanthropy, program staff and donor services staff work with donors to define their interests, advise them on specific nonprofits and help them identify giving opportunities. And through the Foundation's Giving Circles, groups of donors embark on an intensive exploration of complex community issues, such as poverty and environment, to deepen their understanding and help them structure grants to nonprofits working on those issues.

The Harrisons make use of the wish book for ideas on directing some of their donations. But when they opened the fund, they wanted to put a different twist to engaging their grandchildren and worked with Foundation staff to create the certificates of giving. "They are planning over three generations and engaging all of them, which is pretty unusual. It's not common to see grandchildren involved at that level," Ms. Maher says.

John and Linda decide how 90 percent of the Harrison Family Fund's annual contributions are distributed. Their four sons do not direct donations from the fund. But where the remaining 10 percent goes is decided by their grandchildren: Izabella and her 10-year-old sister, McKenzie; Avery, 3; Hunter, 9, and his brother, Chase, 7; and Calder, 11 and his

Photo: John and Linda Harrison

"WE SET UP THE FUND SO IT WILL GO ON FOREVER. OUR CHILDREN WILL TAKE CARE OF IT WHEN WE PASS AWAY. BUT WE THOUGHT, BOY, IF WE GOT THE GRANDCHILDREN INVOLVED RIGHT NOW IT COULD GO ON FOR ANOTHER GENERATION AFTER THAT."

John Harrison

7-year-old brother Julian, who live in Wisconsin and are the only two cousins who don't reside in the Pittsburgh area.

"I tell them on Thanksgiving, you have to start thinking about your donations," says Linda. "And I tell our kids, in no uncertain terms, this is not where you want the money to go to, it's where the children want it to go."

Although the youngest undoubtedly receive guidance from their parents, the choices made by the grandchildren largely reflect their individual interests, the Harrisons say. Their choices last year included donations to Beverly's Birthdays, a nonprofit that provides birthday parties to at-risk children; a chapter of the Humane Society in Wisconsin; Journey to Normal, supporting women of war; Children's Hospital; Toys for Tots; B-Side, support of the needy; the Children's Dyslexia Center of Pittsburgh; the Kilian Cupboard, a food pantry in Mars, PA; and the Aquinas Capital Campaign for the school that two of the boys, Hunter and Chase, attend.

"They've really gotten into it, as little as they are," said John.

John, who grew up in Etna, never experienced the opportunity he is giving his grandchildren. His father was a stationary engineer with the P&LE Railroad and the family didn't own a car until John was 16 years old. That's not to say he wasn't familiar with the act of giving. "My parents never had a lot of money. But my father sure did a lot of helping—always fixing something for someone, always doing something for someone. He always put everyone else first."

It was a trait John acquired. Their children, says Linda, would at times complain they couldn't drive anywhere

without him stopping to offer his assistance to a fellow motorist in need. "We'd be going to church on Easter Sunday all dressed up and somebody would be broken down on the side of the road and he'd start slowing down and the kids would say, 'No, Dad, please don't stop.' We never left anyone broken down."

The couple met in Sharpsburg, Linda's hometown, when, as a high school junior, she happened into the local Isaly's deli, where John was working as a temporary fill-in for an employee on vacation. Within a few years, he had earned an associates degree in engineering and taken a job with Union Switch and Signal.

Some 26 years later, he joined PHW, a friend's industrial packaging company in East Pittsburgh. John wasn't there a year when the owner died. He bought a share of the company and with a colleague from Union Switch and Signal transformed it into a leading manufacturer of cab signaling systems and other fail-safe electronic control systems for the railroad and mass transit industries used by some of the nation's largest transportation systems, including Amtrak and New York's Metropolitan Transportation Authority.

When he neared the age of 70, John and his partner decided to sell the company to a British firm, which was soon acquired by Siemens. He established the Harrison Family Fund not long after.

John and his wife have over the past few years donated to a range of organizations. One recent contribution will allow Northern Regional Police Department to buy a police dog to replace one they are retiring. And they've made annual donations to organizations that support children and families in need, including the Greater Pittsburgh Community Food Bank and the North Hills Community Outreach.

But they take the most pride in watching their grandchildren embrace the spirit of giving. "It was funny this year because they started asking, 'Is it time for us to pick yet, Grandma?'" Linda said. "It's nice not to have to worry about money. But it's wonderful to be able to give back to the community to help those who need it."

90.5 WESA PROGRAMMING HIGHLIGHTS

90.5 WESA provides daily coverage of local news reported by Pittsburgh-based reporters, as well as national and global news reported by NPR news correspondents featured daily in *Morning Edition* and *All Things Considered*. Throughout the day, the program schedule features topical news and talk programs that provide analysis and reporting on important topics and interviews with newsmakers and thought leaders.

Local Programming

Essential Pittsburgh can be heard daily, Monday through Friday. *Life of Learning* examines a variety of topics relating to innovation in learning as well as issues, concerns and challenges facing educators. The project is supported by The Grable Foundation. For the past two years WESA has provided in-depth reporting on behavioral health issues and concerns. Reporter Erika Beras has recently been exploring issues and concerns of refugees about their health care. This is part of a national series called *Living in the Shadows*.

Art, From the Ground is hosted by Bob Studebaker and is a monthly series highlighting small grass roots arts organizations and individual artists that take non-traditional approaches to the creation, presentation, and even the definition of art.

90.5 WESA *Celebrates People Making A Difference* - This is a multi-platform series of 48 radio and on-line video segments featuring stories about everyday people who are making a difference in other people's lives and in their communities.

Keystone Crossroads is a partnership with WHYI in Philadelphia, WITF in Harrisburg, and WPSU in State College. It is a two-year reporting project that will provide stories about cities in transition throughout the state.

On-line Content

Multi-media content can be found at wesa.fm:
<http://wesa.fm/topic/multimedia>.

90.5 WESA

POISED TO EXPAND LOCAL NEWS PROGRAMMING AS LISTENERSHIP CONTINUES TO INCREASE

WHEN DUQUESNE UNIVERSITY announced it would sell its 90.5 WDUQ license in 2010, southwest Pennsylvania stood to lose a viable noncommercial public radio service that served as an alternative source for news and music from commercial radio stations.

Led by The Pittsburgh Foundation, the Richard King Mellon Foundation, and the Heinz Endowments, several Pittsburgh-based foundations came together with WYEP/Pittsburgh Community Broadcast Corporation to support the acquisition of WDUQ and save the public radio programming.

"At the time of the acquisition, Pittsburgh was one of two top 25 media markets without a 24 hour complete NPR news station," said DeAnne Hamilton, General Manager of 90.5 WESA. The newly formatted radio station was successfully launched in July of 2011 with a schedule of NPR news and talk shows as well as locally produced programs and news coverage.

The station was rebranded with new call letters as 90.5 WESA and has been broadcasting for over two years. Many members of the community were unhappy with the switch to news and the reduction of jazz programming, but the audience has recovered from a low of 80,000 at the time of the acquisition and is showing steady gains with a weekly cumulative listening audience of more than 130,000 in nine counties in southwest Pennsylvania.

"We hear from our listeners regularly, 'I was mad at you, but now I love what you are doing,'" said Ms. Hamilton. "It was important to make the connection with NPR news and more people are discovering our content."

In 2012, the station began to expand their local news coverage with the edition of the weekly program, *Essential Pittsburgh*. The live program provides local news coverage, interviews with news makers, discussion of issues and challenges facing the Pittsburgh community and southwest Pennsylvania.

Last year, the station introduced their first News Desk, *Life of Learning*. With a grant from the Grable Foundation, WESA will provide news reporting, feature stories, community forums and segments on *Essential Pittsburgh* examining a variety of topics relating to innovation in learning as well as issues, concerns and challenges facing educators.

"News Desk allows us to focus deeply on a particular topic and provide context and broader coverage," explained Ms. Hamilton. "We assign several reporters instead of just one and are able to cover the story over an extended time period across various mediums, including on-air as well as digital content on our website and social media."

The Pittsburgh Foundation has provided a grant of \$200,000 to enable WESA to expand News Desk programming and coverage, including topics such as the local environment, race and society, politics and government, and science and technology.

"With support from The Pittsburgh Foundation, we are able to expand our staff and therefore provide the community with more resources," said Ms. Hamilton. "The grant also allows us to work with colleges to develop fellowships and internships for their students to provide valuable experience and training to Pittsburgh's next journalists."

As part of its strategic plan, The Pittsburgh Foundation believes that an informed citizenry is a key component of a vibrant democracy. "We provide content that is transportable, you can listen on your MP3 player or smart phone, in your car, and even on the computer at work to stay informed," said Ms. Hamilton.

The Pittsburgh Foundation grant also provides support for professional development of WESA's fundraising staff. "We are marching down the road to sustainability," said Ms. Hamilton. "Our plan is to hire staff and increase our corporate underwriting support."

Membership has grown to over 11,000 and the station is currently funded 50% by individual support. "By growing our other fundraising areas, we will be able to shift our foundation support to provide more programming. We are striving to build a stable, growing financial support base," said Ms. Hamilton.

"People spend quality time with us and what makes us unique is that we can deliver quality content across multiple platforms that enrich their lives."



Above: Elly, Peter and Estelle Fisher

ANDREW FISHER MEMORIAL FUND

On December 8, Dr. Andrew Fisher and his family were involved in a series of collisions that involved 50 vehicles on a snowy stretch of the Pennsylvania Turnpike. After getting his wife, two young children and several accident victims out of harm's way, Dr. Fisher was on his way back to help other victims when he was struck and killed by another car.

"It was a snow storm, and we had hit the car in front of us; our car wasn't all that damaged," said Elly Fisher who met her late husband when they were Peace Corps volunteers in Jamaica. "He got us to safety and ran back to check on other people."

The fact that the 35-year-old UPMC internist's life ended helping others was no surprise to those who knew him. And in order to continue that legacy, Dr. Fisher's family turned to The Pittsburgh Foundation after the tragedy and established the Andrew Fisher Memorial Fund.

"There was a lot of compassion from the community," said Elly, who is Assistant Director of the Oakland Planning and Development Corporation. "We were flooded by cards and food. My mom suggested coming up with something people could do other than sending flowers; she wanted something that would teach our children how to give back. I'm going to use the fund to teach the children philanthropy."

Elly was aware of The Pittsburgh Foundation through her work with a playground project in Friendship, which received support from an endowment at the Foundation.

"Is there anybody else in town who does this, other than The Pittsburgh Foundation? We never thought about going anywhere else. And I'm surprised at how easy it was—very streamlined and straightforward."

Donations so far have totaled around \$25,000, and the fund already has made charitable gifts to Allegheny Cleanways to help in fundraising for a new motor for the Tireless Project boat, which helps with clean up along the rivers, and to Wikipedia, which Dr. Fisher used every day.

The Fisher's children—Peter, 5, and Estelle, 3—are aware of the concept and the early gifts. "They know that it's in his honor," Elly said. "They're not old enough to be able to suggest charitable entities right now, but hopefully as they grow up they'll be able to help select the beneficiaries. We're teaching them to give, but we're also teaching them our values."

JACK McCARTAN LEAVES POWERFUL LEGACY FOR COMMUNITY

Days before he passed away in April, Jack McCartan received heartwarming news when long-time friend, Joe Lagana visited his hospital bedside. College student, Tierra Moses—for whom Jack had arranged a scholarship to attend Pittsburgh Technical Institute—had graduated.

It was cause for celebration under any circumstance. But prior to Jack's intervention, it had been against the odds for Tierra, 20, to even contemplate further education, let alone successfully complete her three-year college course.

Tierra had suffered homelessness on no fewer than eight occasions during her school life, together with her elder sister, Tiann, and brother, Terence. Another two brothers had been killed in separate shootings on Pittsburgh streets. And their mother, Joy, lived under fear of homelessness as she struggled to keep her family together in McKees Rocks.

As the retired Executive Director of Allegheny Intermediate Unit, which oversaw the 42 Allegheny County school districts, Joe was alerted to the family's plight by a former colleague at Sto-Rox School District. Joe took the family's story to Jack McCartan, his friend of over 25 years.

Starting with Terence, Jack arranged scholarships, including campus lodging fees, for all three youngsters at Pittsburgh Technical Institute, the organization he founded in 1990.

"Tierra was the last to go through college and Jack was thrilled that she had graduated," said Joe. "He was passionately committed to trying to break the chain of poverty and homelessness, one family at a time. I know that in many ways the Moses family helped symbolize that mission for him."

The extraordinary generosity of Jack and his wife, Margie, has extended far beyond the Moses family. After selling their interest in Pittsburgh Technical Institute in 2008, the couple earmarked additional resources to their funds they had previously established at The Pittsburgh Foundation, becoming the organization's biggest living donors.

The couple's funds support a wide range of charitable causes, including programs that support children, youth and families and addressing issues that include health, homelessness and poverty.

Education was especially important to Jack and Margie. Jack's father, the late John R. McCartan had to

drop out of school in sixth grade in order to go to work to help support his family when they fell on hard times. Ultimately, though, he went on and passed the Certified Public Accountant exam and started his own accounting firm in Pittsburgh.

One of Jack and Margie's funds at The Pittsburgh Foundation is in memory of Jack's father providing support for students who display excellence in accounting at Robert Morris University.

Sadly Jack died from lymphoma on April 12 at St. Barnabas Nursing Home in Gibsonia. He was 79.

The Pittsburgh Post-Gazette wrote: "Throughout his career, Jack was the president of two schools, the vice president of another and held key roles at five other institutions. He had a vision of accessible, career-focused post-secondary education and he spent his life implementing that vision at schools across the eastern half of the country."

Born in Mt. Lebanon, Jack graduated from the University of Notre Dame in 1956 and his father brought him on as vice president of the Robert Morris School, which he had acquired in 1948 and which later became Robert Morris University. Under Jack's leadership, Robert Morris expanded, taking over the Rust Engineering Building and the Oliver Kaufmann estate in Moon, which became the university's main campus.

"The Pittsburgh Foundation has a huge donor family and like all families, we're not supposed to have favorites," said Yvonne Maher, The Pittsburgh Foundation's Vice President of Development and Donor Services. "But Jack was especially close to our hearts. He and Margie have been exceptionally generous, caring individuals who have made a tremendous difference to the lives of a great many in our community. We will miss Jack so much, and we will continue to support Margie as she continues to build a philanthropic legacy for which she and Jack will be remembered for many generations to come."

Joe Lagana, who is the founder and CEO of the Homeless Children Education Fund, added: "Jack was an extremely courageous man. He was a true visionary always willing to take risks in using his wealth for the improvement and betterment of mankind."

IN MEMORIAM



Margie and Jack McCartan

IN MEMORIAM JAN VISH

Sympathies and condolences from the staff and Board members of The Pittsburgh Foundation go to the family and friends of Jan Vish who passed away after being taken ill at her home on February 27, 2014. She was 73.

Jan, Executive Assistant to Yvonne Maher, the Foundation's Vice President for Development and Donor Services, joined the Foundation in 1995.

"It was with deep sadness and great shock that we learned of her passing," said Yvonne. "Jan was an exceptional and extraordinary individual and she was an enormous source of help, support and encouragement to us all. Many of our donors will remember Jan for her help and kindness. She is greatly missed."

Jan leaves her son, David and husband, Dom, with whom she was married for almost 50 years. She was an active member of the North Hills Alliance Church where many Foundation staff and Board members attended a memorial service.



Jan Vish

OFFICER ROCCO K9 MEMORIAL FUND

THE PITTSBURGH FOUNDATION AND THE CITY OF PITTSBURGH invited public support for a special fund established in memory of Rocco, the Pittsburgh Police K-9 Officer that died from injuries received when stabbed while on duty.

The Officer Rocco K9 Memorial Fund was created to provide on-going care, training and support for the City of Pittsburgh Police Bureau—Canine Division.

Rocco, the eight-year-old German Shepherd was stabbed in an incident in Lawrenceville on the night of January 28. Three officers, including the dog's handler

Officer Phil Lerza, received injuries in the incident. Rocco, who specialized in locating guns and detecting accelerants, joined the Pittsburgh Police in 2008.

Over 200 contributions were received from the community and the fund has grown to over \$80,000. A t-shirt fundraiser by Cassandra Buncie and the Black and Gold Girls raised \$47,000. The fund will make its first grant of \$20,000 to purchase bullet proof vests for K9 officers.



Photo (left to right):
Mike LaPorte,
Jennie Zioncheck,
Officer Phil Lerza,
Howard McQuillan

"In the last three years, we've really focused on The Pittsburgh Foundation as a resource and partner. The clients we've referred over to them have been extremely satisfied."

Jim Rimmel
Managing Partner,
Rimmel Mehaffey
Pessy Stager
Wealth Consulting
Group of UBS.



Photo: Jim Rimmel and William Mehaffey

ADVISOR PROFILE:

THE LOCAL TOUCH

Advisors appreciate Foundation's "hands-on" approach

WHEN SOMEONE ASKS JIM RIMMEL at a cocktail party what he does and he says he's a financial advisor, the conversation usually turns to investment. But for Mr. Rimmel, who is managing director at the Rimmel Mehaffey Pessy Stager Wealth Consulting Group at UBS Financial Services, the more important part of any wealth management conversation starts with planning.

"As you go through that planning with clients, some are more interested in charitable giving," Mr. Rimmel said. "For some, that's the way they were raised and are wired. And some become more interested when you ask them, 'What is your favorite charity?' Once we make that discovery, we have a conversation: What's the best way to satisfy that charitable giving? What is the entity to help you?"

At that point, Mr. Rimmel and his colleagues often suggest clients consider The Pittsburgh Foundation as a partner.

"We've known about The Pittsburgh Foundation and the work they've done for a long time," said Mr. Rimmel. When Mr. Oliphant became President and CEO of The Pittsburgh Foundation, Mr. Rimmel's wealth consulting group got to know the Foundation staff, which explained the client benefits of a joint relationship.

Although UBS has numerous funds and resources for charitably inclined clients, according to Mr. Rimmel, "The big selling point at The Pittsburgh Foundation is

that they're local, they're involved, and there's a huge educational component.

"The personal touch is very important. The Foundation has done a great job with our clients."

Inter-generational wealth planning and wealth transfer is an important issue for a number of Mr. Rimmel's clients. "Part of that is teaching the next generation—the children and grandchildren—how to be good stewards with money they have. The Pittsburgh Foundation helps clients do that. I'm at the age where I'm trying to instill the right values in my own children. And if there's an opportunity to work with an organization that will help me work with my own children, teach them the values of stewardship, and help them along the way—that's a big deal to me personally."

Mr. Rimmel said his clients' experiences with the Foundation have been "extremely favorable" and suggested that other financial advisors in the region would do well to refer clients to the Foundation. "If you have not looked at The Pittsburgh Foundation or entertained it as part of a solution for your clients' charitable giving plans, it's something that should be revisited."

The views expressed herein are those of the individual advisor and do not necessarily reflect the views of UBS Financial Services Inc. (UBS). The article is for informational and educational purposes only and should not be relied upon as the basis for an investment decision or charitable donation. UBS Financial Services Inc and its employees are not in the business of providing tax or legal advice. Individuals should seek advice based on their particular circumstances from an independent tax advisor. UBS Financial Services Inc. and The Pittsburgh Foundation are not affiliated.

TECHNOLOGY GRANTS:

FOCUS ON WESTMORELAND

IMPROVING OPERATIONS, BIT BY BIT

WHEN IT COMES TO SERVICE ORGANIZATIONS in the Greensburg area, there's good news and bad news: "Westmoreland County is very grassroots," says Susan Acito, Program Officer at the Community Foundation of Westmoreland County. "Many of the organizations have a heavy volunteer presence."

However: "If someone can't run payroll, if they can't access a database, if they can't work remotely, then they're limited in how much service they can provide."

Technology woes affect organizations great and small, and it's no secret that many vital nonprofits struggle with hopelessly outdated software. Some community leaders use computers that run on Windows XP, an operating system that Microsoft will soon abandon altogether. When a nonprofit's staff is 100 percent volunteer, and its equipment has all been donated, technical glitches can run rampant.

To tackle these issues, the Community Foundation of Westmoreland County developed its Technology and Communications Grant. Created last year, the grant is designed to bolster organizations with essential hardware, improved software, and basic mobile networks that can streamline daily operations. The grant has already been an enormous success in Westmoreland County. The Community Foundation awarded 18 grants during its first cycle, for a grand total of \$160,000, and the money has already had a transformative effect.

"For our community, it was really a big deal," says Susan Acito, Program Officer, at the Community Foundation of Westmoreland County. "The smallest grant we gave was about \$1,700, and that was for the Tri-City Meals on Wheels group." In order to stay solvent, Meals on Wheels needs to receive regular payments from their clients. (There is a fee to receive a delivered meal, modest as it is). Because Meals on Wheels was using a clunky Excel spreadsheet, organizers couldn't keep track of which clients had paid. The grant allowed them to switch from Excel to QuickBooks, a much easier and more sophisticated accounting system. Now all payments are processed smoothly.

The Foundation also awarded a Technology Grant to a caseworker working in the nonprofit housing sector. After interacting with clients, the caseworker had to drive all the way to her office and write a report. Deadlines for updated reports are tightly mandated, and writing them demanded lots of overtime. Thanks to a \$1,500 grant, the caseworker purchased a laptop that radically cut down her commute. "There's no reason for her to drive excessive miles or work late at night," says Ms. Acito.

The biggest success story is the Majesty Health Care Clinic, an all-volunteer organization that recently opened in Greensburg. In healthcare, maintaining accurate patient records is an essential, even life saving, practice. A \$9,000 grant from the Community Foundation enabled Majesty to invest in new computers and a fluid database.

Ms. Acito notes that all of these grants are nominal sums, but each has had a profound impact on internal operations.

"Seventeen hundred dollars is absolutely nothing," says Ms. Acito, compared to more competitive nonprofits with larger budgets. "A little bit of money goes a long, long way."



WHEN YOUR STAFF IS 100 PERCENT VOLUNTEER, AND YOUR EQUIPMENT HAS ALL BEEN DONATED, TECHNICAL GLITCHES CAN RUN RAMPANT.

The biggest success story is the Majesty Health Care Clinic, an all-volunteer organization that recently opened in Greensburg. In healthcare, maintaining accurate patient records is an essential, even life saving, practice. A \$9,000 grant from the Community Foundation enabled Majesty to invest in new computers and a fluid database.

Photo: Dr. Larry Lyons and Ellie Yearsley, RN, discussing treatment options for a patient and (far left) Billie Ditch, RN.



WHEN FLORENCE JENKINS was growing up in Clairton, Pennsylvania, her mother would take in foster children. Most of the children were very young, babies or toddlers, and the oldest was only four years old. Her mother also worked with mothers whose lives were often chaotic.

“By the time I was 18, my mother had taken in 55 children,” recalls Ms. Jenkins. “I grew up in a mill town. I learned that you have to help within the community.”

Since those formative years, service has been an essential part of Ms. Jenkins’ life. Known to all her friends as Flo, Ms. Jenkins has volunteered for various causes around Westmoreland County, from hospitals to the Girl Scouts, ever since she moved to the area in 1979. One of those causes is the Blackburn Center, where Ms. Jenkins works part time helping victims of domestic violence and sexual assault.

“It’s always been a passion of mine,” says Ms. Jenkins of her work with Blackburn. “The problem of domestic violence touches every family everywhere.”

Some years ago, Ms. Jenkins’ mother-in-law, Susanna Jenkins Bowman, decided to take the money she and her late husband, Bussy, saved and start a fund. Ms. Jenkins’ husband, Jack, passed away in 2004, but she and Susanna remained close, and she offered to help start a donor-advised fund at The Community Foundation of Westmoreland County (CFWC).

“They always wanted to do good things with the money,” says Ms. Jenkins. “That’s what she said over and over. She grew up with very little. Her father was a coal miner. She understood the need, when you have very little. And when you have something to share, you share it.”

Ms. Jenkins had worked in human resources for various companies for many years. She talked with an attorney, who recommended partnering with CFWC. Ms. Bowman passed away in March, but her legacy is the Susanna and Bussy Bowman Fund. Today, Ms. Jenkins acts as advisor for the fund’s charitable giving, along with her own son J.J.

While Ms. Bowman was interested in certain causes, such as the Food Bank, her fund reaches out to a wide variety of organizations. “We’re not a fund that goes in one direction,” says Ms. Jenkins. “We make decisions to share the funds that we have. We try to find a need to fulfill.”

Ms. Jenkins is a mother of two adult children and grandmother of seven. After more than three decades in Westmoreland County, she still loves the area, but she is realistic about its challenges.

“I think it’s a good place to raise kids,” she said. “I think all of the good parts have stayed. But we have a tremendous drug problem here. Domestic violence is a huge issue. Child abuse is a huge issue. It’s vital for the agencies to step in. I think it’s important we stay focused, that we don’t get too caught up in the politics of it, and keep remembering that these are people there.”

As for continuing her own mother’s tradition of helping the needy, Ms. Jenkins is decidedly humble. “This for me is natural,” she says. “There’s no other way to be.”



FOCUS ON WESTMORELAND:
**FLORENCE
JENKINS**

Photo: Florence Jenkins (center) with grandson Jorn and son J.J.



Five PPG Place
Suite 250
Pittsburgh, PA 15222

PLEASE SHARE YOUR THOUGHTS AND IDEAS

about issues in which the Foundation is involved and those affecting our community.

Nonprofit Org
US Postage
PAID
Pittsburgh, PA
Permit #1044

DEVELOPMENT AND DONOR SERVICES STAFF

Yvonne Maher, Vice President for Development and Donor Services
mahery@pghfdn.org, (412) 394-2644

Lindsay Aroesty, Assistant Director of Donor Services and Planned Giving
aroestyl@pghfdn.org, (412) 394-2606

Hilary Brown, Philanthropic Relations Officer
brownh@pghfdn.org, (412) 394-2607

Caleb Crousey, The Community Foundation of Westmoreland County, Development Officer
ccrousey@cfwestmoreland.org, (724) 836-4400

Gwyneth Gaul, Director of Development
gaulg@pghfdn.org, (412) 394-2627

Neil Straub, Data Analyst, Administrative Support
straubn@pghfdn.org, (412) 394-2624

Kelly Uranker, Director of Philanthropic Resources and Donor Education
uranker@pghfdn.org, (412) 394-2604

Arlene Vukas, Administrative Support
vukasa@pghfdn.org, (412) 394-2640

Trista Yerks, Administrative Support
yerkst@pghfdn.org, (412) 394-2653

Jennie Zioncheck, Development Officer
zioncheckj@pghfdn.org, (412) 394-2621

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 the Development and Donor Services team at (412) 394-2653 for more information.


NEW FUNDS February 1, 2014 – May 30, 2014

- Angels Among Us Family Fund
- Gregory Aromatorio Charitable Fund
- Boyd Family Foundation Fund
- CASA of Westmoreland Endowment Fund
- Rosalind Chow and Jeff Galak Charitable Fund
- Crane Family Fund
- P.J. DiNuzzo Family Charitable Fund
- Charles and Luella Kester Scholarship Fund
- Daniel S. Kothmann Memorial Fund
- Ligonier Valley Endowment/Martha Lou Schove Fund
- Violet C. Matteo Fund
- Paul Pepper and Leslie Miller Charitable Fund
- Toby MacDonald-Mingo Memorial Fund
- Herbert Nelson Riley Fund
- Officer Rocco K-9 Memorial Fund
- Penn Pals Fund
- Oliver C. and Audrey Y. Ragsdale Family Fund
- St. Nicholas Fund
- Tracy A. and Kevin R. Walsh Scholarship Fund
- Bob and Betty Willison Fund


STAY CONNECTED

Visit Our Blog. Community E-Forum, is for everyone who shares our mission to make this community a better place for us all. Subscribe to the RSS feed and never miss a post at:

<http://blog.pittsburghfoundation.org>

 **Connect with The Pittsburgh Foundation on Facebook:**

<http://www.Facebook.com/PittsburghFdn>

 **Follow The Pittsburgh Foundation's updates on Twitter @PittsburghFdn or**
<http://twitter.com/PittsburghFdn>