

THE PITTSBURGH  
FOUNDATION  
QUARTERLY  
Winter 2018

**8** **WOMEN LEADING WOMEN**  
*A scholarship funding  
legacy thrives in  
Westmoreland County.*

**10** **AGING IN PLACE**  
*Grants help seniors stay  
engaged at home.*

**14** **LEGALLY MINDED**  
*Scholarships do justice  
to law students in need.*

# FORUM



FEATURE  
STORY

## SPARKING CREATIVITY AND DIVERSITY IN PITTSBURGH ARTS

*Foundation programs pump up  
the careers of local artists.*

SEE PAGE 4

**ON THE COVER**

Artist Sarika Goulatia in front of one of her large-scale art installations at her Pittsburgh studio.

# PRESIDENT'S MESSAGE

## IN THIS ISSUE

### 4 SPARKING CREATIVITY AND DIVERSITY IN PITTSBURGH'S ART SCENE

*The Carol R. Brown Creative Achievement Awards and Advancing Black Arts are leaders in building and supporting diversity.*

### 8 WOMEN OF PURPOSE

*An endowed scholarship fund at The Community Foundation of Westmoreland County supports scholarships from a historic women's organization.*

### 10 NO PLACE LIKE HOME

*Foundation support builds strategies to provide services and support to seniors.*

### 14 JUSTICE FOR ALL

*Among the many Foundation scholarship programs are several specifically for law students.*

7 Staff Profile:  
Jamillia Kamara

13 Staff Profile:  
Amy Razem

16 Donor Profile:  
John and Betsy Baun

18 Advisor Profile:  
Heather Stumpf

**D**AILY JOURNALISM IS THE FIRST ROUGH DRAFT OF HISTORY.” That memorable line, a favorite of Washington Post Publisher Phil Graham in the 1950s and ‘60s, has been dusted off and polished to a high gloss by Meryl Streep in “The Post.” She plays Katharine Graham, who took over running the newspaper after her husband’s death. In 1971, Graham put everything on the line defending First Amendment press freedom against government attempts to control publication of the Pentagon Papers. And then she went on to become one of the great journalists of her time, finally winning a Pulitzer Prize for her autobiography.

Nearly 50 years later, seismic technological changes have roiled the business of gathering and disseminating the news, and our divisive, tribal culture has splintered the very definition of truth. The work of daily journalism is more complex, and the pace is exceptional, requiring journalists to tweet, blog and post before they even submit their copy to editors. The result is a lot of clutter in the historical drafting. News without factual underpinning, breathless writing on every political, economic and diplomatic up-and-down without even enough time to fully report—these things are more chatter than solid drafts of history.

Compelling stories that explain our time will survive. The best of daily journalism seeks to fulfill this crucial explanatory role, and often the settings for the most important explanatory stories are in our cities and regions, not in Washington or state capitals. As a newspaper editor-turned-philanthropic leader, I see critically important charges here for community foundations: We need to identify the real history being made in the places we serve; we need to support that work; and we need to assist in the drafting of the first accounts of it.

If this issue of Forum is any guide, local communities empowered by thoughtful, strategic philanthropy are creating the conditions in which historical achievements can happen.

The cover story focuses on two foundation-directed awards programs supporting individual artists. The strategic bet—a wise one, I think—is that rewarding creative leaps and promoting diverse art forms will lead some of these artists to make history. Our coverage of Westmoreland County includes a report on a college scholarship program encouraging students to take on leadership roles. The fund was started 100 years ago by a group of women who didn’t even have the right to vote but who recognized their power to change the historical narrative. Another scholarship story profiles two law school students who plan to use their law degrees to pursue social-justice work after graduation, and perhaps make some legal history.

From our own back yard in Pittsburgh to the nation’s front yard in Washington, we in community philanthropy need to lead with the question, “What is the real history that is being made?” And then we must ensure that the story drafting is as honest, inclusive and thoughtful as those in the future will depend on it to be.

Vu Le uses humor to tackle serious issues in the nonprofit world. His book, "Unicorns Unite: How Nonprofits and Foundations Can Build Epic Partnerships," is coming out this spring.



## #GiveBigPittsburgh

From small to large — nonprofits raise money through online effort

In its inaugural year, #GiveBigPittsburgh laid a sturdy foundation for the future of the 24-hour online fundraising campaign for Pittsburgh nonprofits. A total of nearly \$1.5 million was raised from 6,770 donors on Nov. 28 to assist 493 area nonprofits.

The #GiveBigPittsburgh fundraising initiative was held on the national Day of Giving, a charitable antidote to the conspicuous consumption of Black Friday, Small Business Saturday and Cyber Monday during the holiday season.

In previous years, Pittsburgh organizations raised money through Pittsburgh Gives, which was sponsored by The Pittsburgh Foundation. Starting in 2017, that morphed into #GiveBigPittsburgh, a collaboration between the Foundation and Pittsburgh Magazine. The Foundation donated \$50,000 in prize money for participating nonprofits, and The Community Foundation of Westmoreland County provided \$25,000 in incentive funds for Westmoreland County nonprofits.

Light of Life Rescue Mission, a Christian ministry providing meals, housing and educational programming for homeless individuals and families, was at the top of the #GiveBigPittsburgh campaign, raising \$71,975. The Humane Animal Rescue and Pittsburgh Cultural Trust rounded out the top three in dollars raised. The Humane Animal Rescue, Carnegie Library of Pittsburgh and Planned Parenthood of Western Pennsylvania took the top three spots for the largest number of donors to the campaign.

To ensure that the #GiveBigPittsburgh campaign would benefit organizations of all sizes, prizes were awarded to nonprofits for innovative fundraising strategies.

Three — Bunker Projects, Pittsburgh Festival Opera, and Three Rivers Young Peoples Orchestras — were each awarded the "Terrific Tweeter" trophy and \$1,500 for creatively using social media to raise awareness of their #GiveBigPittsburgh campaigns.

## HEY, NONPROFITS—OWN YOUR POWER!

Center for Philanthropy co-hosts national blogging sensation at Pittsburgh forum

Seattle-based nonprofit executive Vu Le is many things: manager of the Ranier Valley Corps, which develops leaders of color in the Seattle area; a vegan; a sought-after national speaker; and the author of a wildly popular blog.

That last role is what has made Le a superhero to many in the nonprofit sector: he is the provocateur, humorist and sharp thinker who writes a weekly blog at NonprofitAF.com, formerly known as Nonprofit with Balls. While the name has changed — the AF stands for "Amplified and Focused" — the blog's mission continues to be to air the tough issues faced by those who work for nonprofits. But Le's style, as described on the blog website, is to "explore the fun and frustrations of the work."

The Pittsburgh Foundation's Center for Philanthropy, which brings donors, foundation staff and outside experts together to address significant community problems, co-sponsored the session last fall with Nonprofit Talent, an organization that consults with and hires for nonprofits. Speaking to a maximum-capacity crowd at Point Park University, Le did cheerleading and truth-telling to an audience of predominantly nonprofit staff, who appreciated both.

Le's main messages: ditch the inferiority complex, stop comparing your nonprofit to a for-profit organization, focus on the communities you serve, and play nice with your colleagues in the field. He also encouraged nonprofits to own their power, pointing out that nonprofits have the third-largest workforce in the United States — the workforce that does the most difficult work of helping people in marginalized communities improve their life situations.

Le, admired as a fierce advocate for the sector, doesn't mince words. In his Point Park appearance, he pushed his audience to advocate publicly on issues close to an organization's mission, focus on longer-term outcomes, and stay away from formulas for measuring effectiveness that too often perpetuate inequities among nonprofits and in communities they're supposed to serve.

In a presentation illustrated with pictures of baby animals, he told the crowd, "We are Jedi unicorns!" meaning that nonprofits are remarkably different from for-profit enterprises, that their work has its own substantial value, and that they are the agents of balance in community life. The benefits might take years to be realized, said Le, but most often, they're worth the wait.

# SPARKING CREATIVITY AND DIVERSITY IN PITTSBURGH'S ARTS SCENE

**THE CAROL R. BROWN CREATIVE ACHIEVEMENT AWARDS AND ADVANCING BLACK ARTS ARE LEADERS IN BUILDING AND SUPPORTING DIVERSITY**

**S**ARIKA GOULATIA'S morale was at an all-time low. The artist was questioning everything: her ideology, her goals — even whether the emotional and financial sacrifices she had made for her artwork were worth it.

When Goulatia found out she had won the 2017 Carol R. Brown Creative Achievement Award for emerging artists, which includes \$15,000, her mood shifted to elation and gratitude for the validation from the artists who chose her from among the many nominees. The award gave her the strength to continue her sculptures, paintings, large-scale installations and other work.

“As artists, we are rarely compensated for our work,” says Goulatia, who was born and raised in India and moved to Pittsburgh in 2002. “Perseverance, hard work, dedication and a true belief in my art keeps me going. The award demonstrates that my community embraces and supports my endeavors.”

Making a living as an artist is notoriously difficult. The Pittsburgh Foundation is one of only a few organizations

# ITY



Artist Sarika Goulatia in her Point Breeze studio where she creates large-scale sensory sculptures and installations.



↑ Costume designs by Susan Tsu have graced stages from Broadway to the Bolshoi. Tsu won the 2017 Established Artist Carol R. Brown Creative Achievement Award.

regionally to fund individual artists, especially artists of color. The works of women artists and those of color often sell for less and are exhibited less frequently by museums and galleries. The Carol R. Brown Creative Achievement Awards and Advancing Black Arts in Pittsburgh grants help create an environment in which these artists can be elevated, thereby promoting work that critiques society or amplifies the voices of those who are not often heard.

“The richness and vitality of Pittsburgh’s cultural community is dependent upon the excellence and diversity of the community of individual artists, both emerging and established,” says Carol Brown, award namesake and founding president of the Pittsburgh Cultural Trust. As the driving force behind the organization that turned Pittsburgh’s downtown core from a seedy red-light district into the thriving Cultural District, Brown knows the importance of the arts in building strong communities.

The Carol R. Brown Creative Achievement Awards is a partnership between The Pittsburgh Foundation and The Heinz Endowments, and is part of the larger Investing in Professional Artists program, which both foundations direct. The Advancing Black Arts in Pittsburgh grant-making program, another joint effort supporting artists, has awarded \$4.5 million since its inception in 2010.

Advancing Black Arts also gives organizational grants, but focuses on individual awards toward the goal of fostering collaboration in the black arts sector, addressing racial disparities in the arts community, and increasing general community awareness of black arts and culture.

“Thematically, the intent is to put the resources in the hands of the creator of the work rather than in the organization to hire the creator,” says Dr. Jeanne Pearlman, the Foundation’s senior vice president for Program and Policy. “It gives the artists the resources to take time to make new work or refine their practice. It also is a type of affirmation that the artists can use to introduce their work to new audiences.”

In addition, The Pittsburgh Foundation’s Investing in Professional Artists program and A. W. Mellon Fund grant about \$1 million each year to individual artists. All are helping sustain the larger-than-average population of artists in Pittsburgh as compared to similarly-sized cities. According to the Greater Pittsburgh Arts Council, there are 248 artists per capita here compared to about 148 per capita in cities such as Minneapolis and Baltimore. Yet, despite the larger community, problems facing artists are the same as elsewhere: rising housing costs, underemployment, lack of health care and financial instability.

“Investing in Professional Artists and the A. W. Mellon Funds help bridge these gaps by offering working artists needed capital,” says Celeste Smith, program officer for Arts and Culture. “That support allows them to produce artwork that addresses social justice issues, sets a human connection or satisfies the inherent human attraction to art.”

In fact, the popularity of art in all the various cultures and ethnicities that make up Pittsburgh’s societal mosaic is a key factor in a program such as Advancing Black Arts in Pittsburgh, which funds residencies that place working artists directly in communities.

“These collaborations between artists and presenting organizations are opportunities to train artists whose work may not be well-known, or not developed enough to be introduced to new audiences,” Pearlman says.

Improving the arts ecosystem is just one of the many goals of the Foundation’s programs that have directed millions of dollars to individual artists over the years. The funding is important, and the awards affirm artists’ work and encourage them to continue to pursue their passions and talent.

As costume designer Susan Tsu, who won the 2017 Carol R. Brown Creative Achievement Established Artist Award, said at the December ceremony, “Long after a culture has perished, the artists who held the mirror up to life remain—both as conscience and treasure—to remind us of the humanity of the age.”

**J**AMILLIA KAMARA has been a teacher, an entrepreneur and a consultant. At The Pittsburgh Foundation, she has a full plate, supporting the Program staff.

“One of the cool things about my job is I get a little bit of everything,” Kamara says. “It’s definitely a holistic experience, and it’s helping me build on my experience in education, community engagement and outreach. It’s been a really awesome, inspiring next step.”

#### STAFF PROFILE

# JAMILLIA KAMARA

The Pittsburgh Foundation’s newest program associate is ready to tackle it all

Kamara says she is most excited to be participating in projects stemming from the Foundation’s 100 Percent Pittsburgh organizing principle, which seeks to provide economic opportunity for those with no access to the region’s revitalized economy.

“Jamillia has quickly proved to be a strong partner in our department’s efforts to amplify voices of people who are most affected by economic injustice, and to explore new strategies for transforming systems, including our own, to better meet community needs,” says Michelle McMurray, senior program officer for Health and Human Services.

Her work to support 100 Percent Pittsburgh efforts is rewarding, says Kamara, because the Foundation is acting intentionally to include community residents in the process of identifying programs and services they believe will benefit them most.

“It feels great to be in a place where the talk is being walked,” she says.

By **Deanna Garcia**

→ Jamillia joined the Program staff in 2017 to focus on education and equity related to 100 Percent Pittsburgh, the Foundation’s organizing principle.



**ON A SATURDAY NIGHT IN FEBRUARY 1918,** 31 women gathered in a Greensburg home for the first meeting of what became the Greensburg College Club.

They were friends and neighbors, and a few were sisters. All of them had been fortunate enough to earn college degrees despite living in the era when women were denied the right to vote. Undaunted, they were committed to leading projects to benefit their communities.

In the several years before the club's founding, when World War I was raging and American troops had taken up the fight in Europe, the women made bandages and sold war bonds. By June of that year, the war had ended and the women began searching for a new cause.

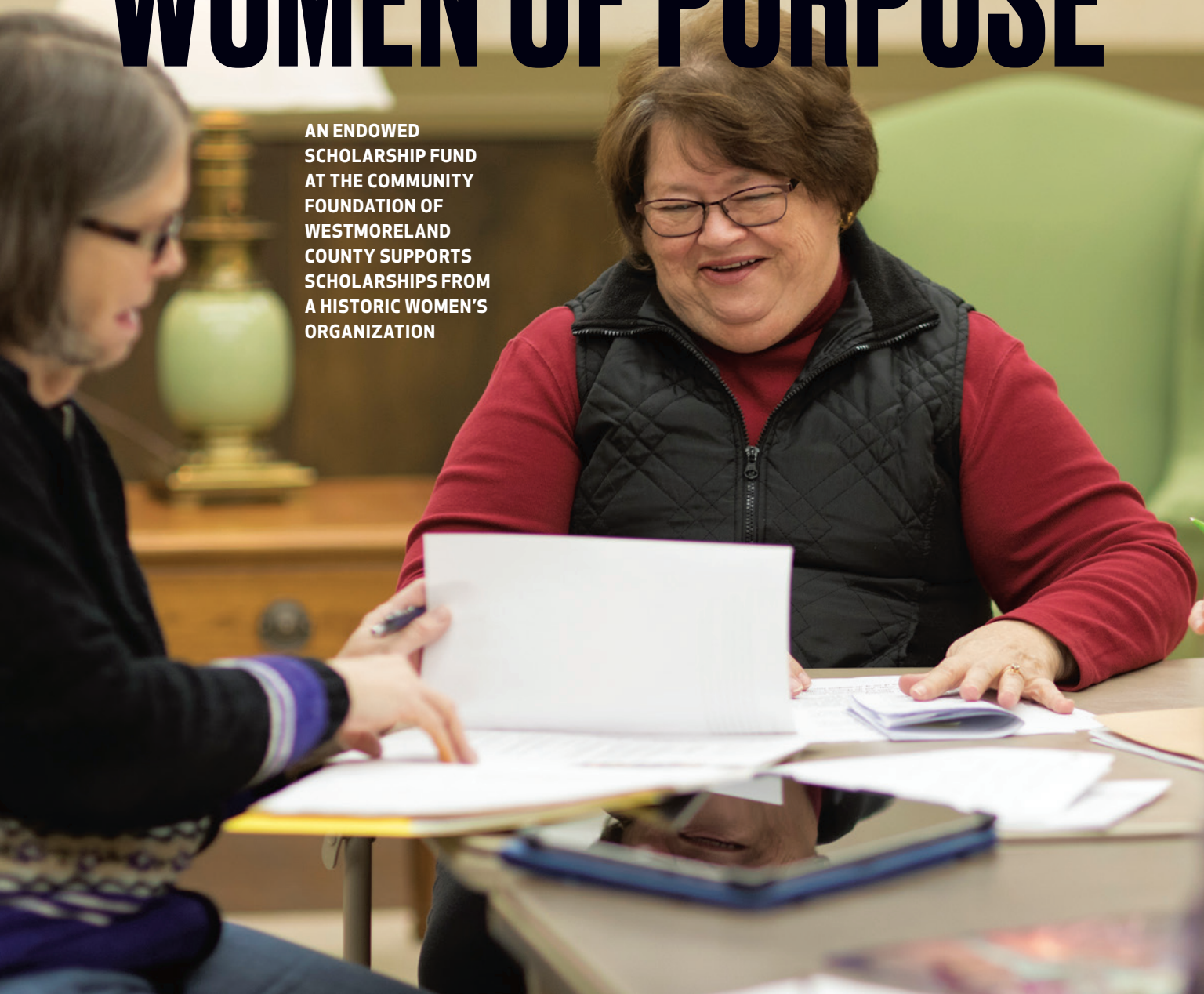
"They decided to change the purpose of the group to—and this is a direct quote: 'Foster ideals of higher education and contribute to the educational and civic welfare of the community,'" says Carol Constantine, a former club president and 42-year member.

The group started fundraising and, in 1921, awarded the first College Club scholarship to a Westmoreland County student headed to higher education. The scholarship check totaled \$150. Now, as back then, the scholarships go to students who think critically, demonstrate good character and leadership, and go beyond academics to care for others and the community at large.

Over the last century, the women of the College Club have also been contributing to the

# WOMEN OF PURPOSE

AN ENDOWED  
SCHOLARSHIP FUND  
AT THE COMMUNITY  
FOUNDATION OF  
WESTMORELAND  
COUNTY SUPPORTS  
SCHOLARSHIPS FROM  
A HISTORIC WOMEN'S  
ORGANIZATION





civic well-being of Greensburg by partnering with community institutions, including the public library, to provide scholarships and enrichment opportunities to girls and young women.

The scholarship mission resonated with Dorothy Ruoff, a local teacher, school principal and devoted member of the College Club. Ruoff, who died in July 2015, left a bequest of \$343,300 to the Greensburg College Club. The Club then used the bequest to permanently endow a scholarship fund at The Community Foundation of Westmoreland County. “We were shocked that she’d named us in her will,” Constantine says.

Proceeds from the endowed fund, which are supplemented by those the club raises through special events, ensure that scholarships will be awarded in perpetuity. If there is a point

at which the Club members no longer wish to remain involved, CFWC will continue to manage the scholarship program. It’s a win-win for philanthropy and higher education.

“Any woman in Greensburg who was involved in the community was a member of the College Club,” says Phil Koch, executive director of The Community Foundation of Westmoreland County. “That’s significant when you consider the gender divide—how much women were limited back then in terms of education and careers. In many ways, the club enabled Greensburg-area women to step into civic leadership roles without being challenged by men.”

Koch says the club has continued to offer women leadership opportunities on projects beyond the scholarship awards program. Members have continued to focus on post-high school educational opportunities by underwriting community classes and discussion groups. The goal is to grow a community of learners who enhance the cultural life of Greensburg.

“We’ve had drama clubs and teas for senior girls,” Constantine says. “We’ve given dance lessons to teenagers. We had, at one time, a singing group that did concerts at churches and civic centers.”

Through these events, the club supported the community’s civic and cultural development, offering artistic opportunities and using event proceeds to fund the scholarships that have been its hallmark for more than a century.

“This fund does great honor to the values and traditions of the original 31 Club members,” says Koch. “They were visionaries who, in a time when few women were able to pursue higher education or formal government positions, refused to be left out of the conversation.”

Today’s Club members are college graduates, civic leaders, educators, businesswomen, historians, storytellers, friends, neighbors and sisters, all eager to support the next generation.

“The applicants for scholarship awards from this fund must demonstrate community leadership and community service,” Koch says. “This sends a message that civic engagement is important—that it is a life-long value. I am confident that 30, 40, even 50 years from now, we’ll still be giving out the Dorothy Ruoff Scholarship of the Greensburg College Club.”

By **Maddy Rice** | communications intern

↓ Past presidents Carol Constantine (left) and Paula Daily met in January to plan the Club’s year of centennial celebrations.



**[The original 31 Greensburg College Club members] were visionaries who, in a time when few women were able to pursue higher education or formal government positions, refused to be left out of the conversation.**

**PHIL KOCH**  
*The Community  
Foundation of  
Westmoreland  
County*

NO

PLACE

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**H** **HEALTH INSURERS AND GOVERNMENT PAYERS** such as Medicare and Medicaid have a vested interest in lowering the cost of care, especially for older adults. Programs that help seniors remain in their homes rather than going into nursing homes could significantly reduce overall health care costs. But the customized menu of social and medical services that seniors need to age in place has been established more slowly than most would prefer. It's not just medical intervention. Many seniors need a hallway grab rail, daily meal delivery or a substitute caregiver who provides a break for a family member.

A cluster of Pittsburgh Foundation grants is now focusing on local nonprofits that support stay-at-home services across the spectrum of senior care. Historically, scores of the Foundation's donors specified that their funds broadly support programs for the aging, rather than a particular organization. Last year, to more efficiently deploy those funds, the Foundation invited proposals from organizations aiding seniors. The selected projects address home safety and services, as well as

**FOUNDATION  
SUPPORT BUILDS  
STRATEGIES TO  
PROVIDE SERVICES  
AND SUPPORT  
TO SENIORS**

**ME**



The home must be safe and accessible. People shouldn't have to choose between paying the gas bill and buying medications, so homes should be energy-efficient. If seniors don't have a primary care provider, they may not have a doctor or nurse overseeing their medications. They may need meals, or transportation or respite care."

But identifying the required conditions is only the first step, says Pearlman. Making sure organizations "have the capacity to provide what people need" is essential to realizing the goal of allowing seniors to age in place.

**Home Safety:** When Carol Budzik inventoried the repairs needed at her Sharpsburg home last year, the list was overwhelming. The home in which she and her husband, Jim, raised four children needed a roof, a furnace and new flooring. "When it rained, water was coming in the attic ceiling," she recalls. "I knew the roof needed to be fixed, but I couldn't afford all this. I made phone call after phone call [for assistance]."

Finally, she found Rebuilding Together Pittsburgh, which recently received \$100,000 in support from the Foundation. The construction team provided free upgrades that keep the Budziks' home comfortable and safe.

**Guaranteeing Services for All:** The Jewish Association on Aging provides comprehensive supports for nursing home residents and other clients across the city. The faith-based organization "serves everyone, regardless of ability to pay—we have a diverse clientele," says president Deborah Winn-Horvitz. Each year the agency's Benevolent Care Fund defrays costs for social and health-related services, ranging from Meals on Wheels to adult day care and nursing home care. A recent \$75,000 grant from the Foundation supports the fund, which provides almost 10 percent of the association's overall operating budget.



Exercise and social activities keep members of the Anathan Club at the Jewish Association on Aging engaged and healthy.

caregiver support, data collection and new educational technologies to engage the elderly.

Dr. Jeanne Pearlman, the Foundation's senior vice president for Program and Policy, believes that nonprofit programs create effective care by listening carefully to those they serve.

"It has been my experience that if you ask older people what's most important to them going forward, the most common answer is to stay in their homes," she says. "Lots of conditions are required to make that possible:

**Caregiving:** Not forgotten in the push to keep seniors at home is the critical role of the caregiver. FamilyLinks' Caregivers First Initiative, which received \$75,000 from the Foundation, is a free service that helps caregivers manage stress and learn strategies to cope and care for themselves. The program has already aided 143 caregivers and has been honored nationally.

Following individual caregiver assessments for depression, burden and self-care, each caregiver receives a series of in-home therapy sessions and case management services to coordinate care. A second screening and assessment is conducted within six months. The program also includes follow-up phone calls, and options for support groups as well as connections to transportation and respite.

**High Tech, High Touch:** While technology has been applied to revolutionize health care delivery, it has been slow to engage older patients. The Foundation's \$75,000 grant to Presbyterian SeniorCare Network regional locations supports in2L, (It's Never Too Late), a picture-based, touch-screen interface that allows users to simply "touch" their way to educational, spiritual and personalized content. Technology is available for elders with a wide range of physical and cognitive abilities. Even those who have never used a computer are now enjoying technology, with systems adapted especially for them: using email and web cams to connect with family and friends, enjoying mind-stimulating activities, or improving hand-eye coordination as part of a rehabilitation program.

#### **Coordinating Social and Health Services:**

Comprehensive Care Connections (C3) is now coordinating the transition for the state's Agencies on Aging to a new managed care model. The new program customizes services for clients, who choose the providers to help them stay in their homes, or to return home with support after a stint in a hospital, nursing home or rehab.

"The promise for this approach is coordination of social services with health care services. Historically, the two are siloed," explains Executive Director Paul Cantrell. "This aligns everybody and should help participants." A \$75,000 grant from the Foundation will ease the transition.

C3 contracts with a wide variety of health system payers, and ensures that all providers meet best-practice standards. Sophisticated data collection underpins quality assurance; system users can measure progress toward

systemwide goals, such as a reduction in hospital readmissions within 30 days.

"We're working to collect and analyze data with researchers," Cantrell says. "We're also looking for clues as to who may need social services because of a health event, like an ER visit or a fall. It's a broad system, and it can be hard for one person to see it all. But the flip side of that is the advantage of having everyone, social and health sides, in the same system, and the ability to use data analytics."

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By **Christine H. O'Toole** | freelance journalist based in Pittsburgh

## THE FRAYING SAFETY NET AND THE SAVINGS SHORTFALL

Long marked for having one of the oldest populations in the country, southwestern Pennsylvania has already confronted the challenges of providing care and support to the elderly. But the price of longevity is inexorably rising, for both individuals and health care payers.

Medicare expenditures nearly doubled from 2006 levels to \$675 billion in 2016. Despite policies that have shifted costs away from expensive inpatient stays to outpatient solutions, the trajectory is grim: By 2047, Social Security and the major federal healthcare programs, principally Medicare and Medicaid, will consume two-thirds of all federal spending, up from 54 percent now. Consequently, congressional leaders have targeted the programs as part of looming entitlement reforms.

While such cuts would be devastating to many, they aren't the only threats. Medicare does not cover nursing home care except for limited stays after a hospital admission, and doesn't pay for most in-home care. Medicaid is restricted to covering only the indigent, so couples with more than \$3,000 in assets are generally ineligible. That leaves many families facing huge out-of-pocket costs. Increasingly, it's paying for long-term care that's more likely to bankrupt the middle class.

Americans' savings haven't caught up with their life spans. Half of us have no retirement savings, while the rest of us average only \$100,000. Although nearly 70 percent of people age 65 and older will eventually need some type of long-term care, few families can afford the estimated \$100,000 bill for a year in a nursing home. For most people, long-term care insurance policies are prohibitively expensive. That leaves families frantically searching for free and low-cost aid.

When an aging spouse or parent needs care, the burden usually falls on the closest family member. Even if a caregiver can juggle those responsibilities with a paid job, the personal toll is high. In 2016, for example, those who took care of loved ones with dementia provided an estimated 18.2 billion hours of unpaid assistance. ■

→ Amy Razem works with professional advisors to help their clients achieve their charitable goals.



**CLEVELAND NATIVE AND PITT GRADUATE**  
Amy Razem was working in the for-profit sector when she realized she'd be much more fulfilled supporting a nonprofit mission to improve lives by helping to increase funding. Razem forged her new path at Children's Hospital of Pittsburgh Foundation, working in development there for nearly eight years to realize excellence in the care of young patients, in education and in research. When a position opened in the summer at The Pittsburgh Foundation, Razem says she realized her contributions in supporting nonprofit missions could be even greater. On staff since August, she works with professional advisors and their clients, helping them determine the best options for getting started in philanthropy and getting results they want. Personal interaction with donors, says Razem, is one of the things that sets the Foundation apart.

"Working with donors directly, or along with their advisors, I'm the person to help them understand how they can have a positive impact

#### STAFF PROFILE

## AMY RAZEM

Development officer draws on for-profit sensibility to help financial advisors and clients advance charitable giving

with their philanthropy," she says. "This position is about establishing relationships. That is literally what we do. That's what I love."

Director of Development Jennie Zioncheck agrees and says the newest addition to her team is a great fit.

"Amy's passion for philanthropy, engaging personality and desire to become a part of our team came across from the first interview," says Zioncheck. "She comes to us with excellent training, and I am confident she will thrive here."

By **Deanna Garcia**

# JUSTICE FOR ALL

AMONG THE MANY FOUNDATION SCHOLARSHIP PROGRAMS ARE SEVERAL SPECIFICALLY FOR LAW STUDENTS

## RONDELL MAGIC JORDAN

WINNER OF THE TRUXALL SCHOLARSHIP OF THE PITTSBURGH FOUNDATION

Rondell Magic Jordan is focused on fighting injustice. The University of Pittsburgh School of Law student wants to eradicate the institutional oppression and racism he encountered growing up poor in Brooklyn. “And I do mean poor, not low-income,” he says. “Growing up impoverished provided me with two of my most cherished gifts: empathy and gratitude.”

The Truxall Scholarship Fund is dedicated to the education of new lawyers attending Pitt Law, especially those who need financial assistance for tuition.

A driving force behind Jordan’s pursuit of a law degree is his desire to break the grip of generational poverty.

“I see the law as an opportunity to create a new normal,” he says. “Not only were we poor, but for much of my childhood, my father struggled with an addiction to crack cocaine. My two older brothers were caught up in the criminal justice system. I knew that something could be done about this because I had read about lawyers like Thurgood Marshall and Charles Houston. They had created a new normal for people like me and my family. I knew that I could help to create a newer one. A normal where the troubles that affected my family did not exist.”

As a young, African American man, Jordan has faced challenges. He would routinely be stopped by police on his way to or from school, and his undergraduate advisors tried to steer him toward a more “comfortable” major, among other things.

Jordan will graduate in May 2019 and wants to work in the government in some capacity where he believes systematic change can begin. He says the Truxall Scholarship has eased the financial burden of law school, and it has given him a new appreciation for the power of individuals to make a difference through scholarship philanthropy.

“This is about the incredible generosity of a stranger,” he says. “I know that this is a scholarship and not a loan, but I feel obligated to repay the committee by continuing my pursuits to enact change. My sentiments in one word: thankful.”



Each year, The Pittsburgh Foundation awards nearly \$2.5 million in scholarships, making it one of the largest community foundation-led programs in the country. Scholarship funds honor the legacies of community members such as attorneys Samuel J. Goldstein and John D. S. Truxall. The financial assistance awarded in their names reduced the burden of expensive legal education for scores of law school graduates in the region. Members of both scholarship selection committees were impressed by the life experiences of this year's awardees. Two featured here, plan to use their law degrees to fight injustice.



### SARA WATKINS

WINNER OF THE SAMUEL J. GOLDSTEIN,  
ESQUIRE, SCHOLARSHIP

Sara Watkins was in eighth grade when the ridicule she faced throughout most of her life became more than words. The Shaler Township native says she found swastikas drawn on her locker. As one of few Jewish people in her neighborhood, this moment shaped her worldview and has motivated her to “snuff out inequities” in America by becoming a lawyer to defend and protect others.

The Samuel J. Goldstein, Esquire, Scholarship Fund, provides scholarships to students from Allegheny and contiguous counties, giving priority to Jewish students who have a demonstrated financial need.

Watkins, in her final year at Duquesne University School of Law, is focusing on public interest law. “I want to make an impact on the world. I think the best place for me to make a real difference is in public service,” she says. Watkins interned in the Allegheny County District Attorney’s office and for Judge Patricia A. McCullough of the Commonwealth Court of Pennsylvania. Her goal is to become a judge after practicing law.

“A lawyer’s job, in the simplest of terms, is to take on other people’s legal problems,” Watkins says. “I want to use my education and my voice to help others deal with any inequities they have experienced.”

Watkins always wanted to be a lawyer, but meeting tuition costs has been a struggle. The Goldstein scholarship helps financially and in ways that go beyond defraying the costs of law school.

“People from Pittsburgh care about the next generation,” she says. “I decided years ago, after receiving my first scholarship [from the Jewish Federation of Greater Pittsburgh], that I, too, will help the generation after me by setting up a scholarship fund. The generosity of previous generations plants a seed to pay it forward, to keep this city alive and educated.”

By **Deanna Garcia**

← Scholarship awardees Rondell Magic Jordan, left, from University of Pittsburgh School of Law, and Sara Watkins, from Duquesne University School of Law, plan to combat injustices they have experienced and observed in their young lives.

## DONOR PROFILE

# REQUIRED READING

How the Wish Book  
helps one family give together

**O**VER LAST YEAR'S HOLIDAY SEASON, 10-year-old twins Ava and Julian of Sewickley were given a special reading assignment by their grandparents, Betsy and John Baun: the 2017 Pittsburgh Foundation Wish Book.

Each night at bedtime, the children would sit with their mother and pore over the book, in which 75 nonprofits had listed specific "wishes" of \$2,500 or less that could be fulfilled through grants from donor-advised funds. The children's task was to recommend how to allocate \$500 from their grandparents' fund toward the wishes.

As good books are apt to do, this one challenged the family to think in new ways and, ultimately, helped them clarify what they value individually and as a family.

This holiday tradition started in 2015, inspired by a Forum story about another donor family whose children





would review the Wish Book together with their grandparents to recommend grants.

“I was so impressed by that,” says John, “because it’s something concrete and specific that families can do together at a time when people can get really caught up in material things. I said to Betsy that we have to do this with our family because we want our children and grandchildren to share our feelings of gratitude for the blessings in our lives.”

The Bauns were among 44 Pittsburgh Foundation donor families who gave to last year’s Wish Book campaign. The 2017 effort raised \$170,772, exceeding the fundraising goal by \$8,458 and fulfilling all 75 of the wishes described in the book.

Partners in business as well as in life, Betsy and John have been married for 45 years and have established numerous commercial real estate and financing businesses.



**It was eye-opening for my kids to realize that there are others their own age who are dealing with homelessness and still trying to go to school and do homework. I’m really glad they had a chance to talk about and think through this together.**

ELIZABETH BAUN



From left, Elizabeth Baun with her son, Julian; parents, John and Betsy Baun; and daughter, Ava, have made reviewing the Wish Book together a holiday tradition.

They also worked to instill a sense of caring for community in their daughters, Kiley, of Philadelphia, and Elizabeth, of Sewickley. The Bauns established their Pittsburgh Foundation fund in December 2011 after an advisor recommended starting a charitable fund as a tax strategy to offset significant capital gains.

“Betsy and I have always been big givers and realized that the Foundation would help us give in a more disciplined fashion. It aligned with our collective view on giving and philanthropy,” John says.

While they initially came for the tax benefits, the Bauns have recommended 134 grants from their fund and quickly became frequent participants in the Foundation’s Center for Philanthropy educational programs. To date, Betsy has taken part in three Impact Giving Circles, which bring donors together with grantees over a four-month period to explore an issue in depth and then decide together how to allocate a pool of funds to address that issue. She finds that discussions with her fellow donors help her gain clarity about her own philanthropic values.

The Wish Book, she realized, would be a way to recreate that experience in miniature for her grandchildren, who read the book in preparation for the giving discussion.

“It was fascinating to watch them defend their points of view. One of the first things that Julian picked was Humane Animal Rescue. As we went through the book together, Ava found an organization, Westmoreland County Animal Response Team, that focused on animals rescued after disaster situations. She won us over by arguing that it was more important to give to animals that had no shelter or food,” Betsy says, noting that the children recommended \$250 to the nonprofit.

Ultimately, the grandchildren also gave \$125 to Lending Hearts, which provides emotional support to children with cancer, and \$125 to Homeless Children’s Education Fund. John and Betsy matched the recommendations, donating a total of \$1,000 to Wish Book grantees. Ava and Julian’s mother was pleased that the children took the process so seriously and that they were relating their own lives to the difficulties described in the book.

“So many young people are tremendously ‘me focused’ and entitled,” Elizabeth says. “It was eye-opening for my kids to realize that there are others their own age who are dealing with homelessness and still trying to go to school and do homework. I’m really glad they had a chance to talk about and think through this together.”

The Bauns already are thinking about what causes they will give to this year.

“We’ve gotten so much out of these programs: the in-depth exposure, the field trips, the presentations,” John says. “That exposure helps narrow our focus because there is so much need out there. Those experiences and the Wish Book make things real for us and help us align our compassion with the needs in the community.”

By **Kitty Julian** | senior communications officer

**ATTORNEY HEATHER C. STUMPF**, 36, of Robinson Township, spoke at a November 2017 Pittsburgh Foundation-sponsored advisor event about estate planning in uncertain times. Stumpf, recently named a partner at Clark Hill, talked with Forum about her career path and how recent changes in the tax code are influencing tax and charitable planning for her clients.

#### **Why did you decide to specialize in estate law?**

I started out studying psychology, crime law and justice at Penn State and later went to law school because I wanted to work in juvenile justice, but working with neglected and abused children just devastated me. I took an estates and trusts class and loved it, and have pursued it nonstop ever since. It's challenging. Every estate has its own story, its own drama, and you get to be in the center of it all.

#### **Your field was dominated primarily by late-career lawyers. Is that changing?**

In my third year at the University of Pittsburgh School of Law, I told a professor I wanted to be an estates and trusts attorney. He told me in no uncertain terms that there was no room for new attorneys because there was maybe one person in each firm doing estate law. But now, as people have begun to retire, things are opening up. We are thriving. We're busy all the time and, if you're looking for an area where there is a lot of interesting work, this is the place to be.

#### **What are the upsides of having a more diverse pool of estate lawyers?**

When you're meeting with individuals and families, you need people with a well-rounded understanding of different family situations who can do a good job of advising. Families with second marriages or children from prior relationships have a different dynamic, and we need lawyers who understand that. We are now seeing families where grandparents are the primary caregivers for grandchildren because the parents are dealing with substance-use disorders. Another developing area is special needs. In my experience, families are much more open to talking about disabilities and engaging in long-term planning for children with disabilities who might outlive their parents.

#### **Why do you refer clients to The Pittsburgh Foundation to establish charitable funds?**

I recommend the Foundation because you have fantastic, talented people who really know what they're doing. I've administered a number of charitable trusts and I know



how much work goes into doing it well. I also really like that clients can continue to work with their own investment advisors. Certified financial planners are central to the process. When they refer clients to me to complete estate-planning documents, the clients like that their advisor can continue to manage the assets. That's a win-win.

#### **What do you see as the biggest changes and challenges for your clients because of the new tax code?**

Generally, only people who have or have given away assets of more than \$11 million will be subject to federal estate taxes now. The big shift is really around the income tax issues. Advisors, and I include myself in this group, need an understanding of what the specific changes are and how they will

← Attorney Heather Stumpf helps her clients consider how charitable giving fits into their estate plan.

ADVISOR  
PROFILE

# EVERY ESTATE A STORY

An interview with estates and trusts attorney Heather Stumpf

affect personal income taxes. We need more information, including new tax forms and new rules for workplace payroll deductions. In my opinion, there are more questions than answers at this point.

**A drop of as much as \$60 million in charitable giving has been predicted in our region alone, due to changes in the tax code around deductions and itemizing. Do you think your clients may give differently or less?**

In my experience, there are those who are charitably minded and those who are not. The charitably minded are going to continue to give because they care about specific organizations. I'm not sure they will give as much due to the near doubling of the federal income tax deduction.

**If you had any advice to give to your younger self, what would it be?**

I would tell myself that taking a winding career path, like I did, is a strength. A lot of young lawyers become summer interns at a firm and then may stay in the same type of firm for their entire careers. I didn't do that and have a much broader understanding than if I had stayed where I started right out of law school. My pastor calls it the tapestry: Underneath it's a big mess of strings but on top it's beautiful and it all makes perfect sense.

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By **Kitty Julian**



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Artwork by seniors at Anathan Club at the Jewish Association on Aging, which received a \$75,000 grant from The Pittsburgh Foundation.

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## NEW FUNDS November 1, 2017 – January 30, 2018

31337 Fund

Aaron Curtis Sekora Memorial Fund

Arac-Balee Family Fund

Arthur J. Boyle, Jr. Family Fund

Arthur and Janet Innamorato Family Fund

Bill & Stephanie Kennedy Family Fund

Bob Ford Family Fund

Chuck and Jackie Fusina Family Fund

Claire Bilby Charitable Fund

Dave and Jan Wannstedt Charitable Fund

David and Marjorie Reese Family Charitable Fund

Davidson Sanfilippo Fund

Dr. Kutub M. and Azra K. Saifee Charitable Fund

Fred and Carol Dietz Sullivan Charitable Fund

Greg and Ellen Jordan Fund

J. Edward and Betty Lou Schmidt Memorial Fund

Jeffrey and Beverly Berger Charitable Fund

Jim and Beth Hergenroeder Family Legacy Fund

Joseph and Alice Dominijanni Charitable Fund

LeDonne Charitable Fund

Madia Family Charitable Gift Fund

Marilyn Johnston Memorial Scholarship Fund

Mark DiNuzzo Family Charitable Fund

Mary and Keith Reabe Family Fund

McKeesport Community Fund

McKinney Family Fund

Moul-Summers Scholarship Fund

Naab/Adomites Memorial Fund

Our Daily Bread Fund

Paul M. and Anne Besand Coyne Family Charitable Fund

Rexford Fund

Robert E. Scullion, Sr. & Janet Cercone Scullion Legacy Fund

Rodd S. and Karen M. Werstil Charitable Fund

SAM Memorial Fund

Sanzo Family Fund

Smith Van Stone Fund

Stephans Daughters' Fund

Strangio Family Charitable Fund

Thomas E. Long III and Margaret A. Long Memorial Fund

William N. Forsstrom Fund

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