

A woman in a colorful, rainbow-striped swimsuit is captured mid-jump, splashing into a large fountain. The fountain's water jets are visible in the foreground and background. In the distance, a city skyline is visible under a cloudy sky. The scene is set outdoors, likely at a park or public square.

THE PITTSBURGH FOUNDATION

ANNUAL REPORT 2013

**ON THE COVER**  
**THE FOUNTAIN**

Cecelia Kenawell jumps into the fountain at Point State Park shortly after its reopening.

**MISSION**

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

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## LETTER FROM THE CHAIR

It is my pleasure to introduce this Annual Report, which illustrates what a good year this has been for The Pittsburgh Foundation. The leadership has been strong, and the mission has been clear. Much work has been done to safeguard and advance the well-being of our community.

This moment also marks a time of transition for our Chief Executive. Grant Oliphant, our President and CEO for the last 6 years, left The Pittsburgh Foundation in June 2014 to return to The Heinz Endowments as its new President. Grant's contribution has been immeasurable. Under his tenure our role as a community leader and convener has risen dramatically, as has our grantmaking impact. Donor giving has increased, investments have been well-managed, and our assets now exceed one billion dollars for the first time in our 69 year history. Landmark initiatives were developed, including The Pittsburgh Promise scholarship program for the students of Pittsburgh Public Schools and the on-line giving platform, PittsburghGives, which hosts our region's Day of Giving. Both of these have become national models for similar programs across the U.S.

We are extremely fortunate to have had the benefit of Grant's vision and guidance. He richly deserves this opportunity to lead The Heinz Endowments and we at The Pittsburgh Foundation look forward to our continued relationship with the Endowments as a major funding partner.

Grant, of course, did not do this work alone. Working alongside him has been our superb professional staff, our dedicated Board, our generous donors, and our philanthropic and community partners. The Board and I are fully committed to maintaining the wonderful momentum we have achieved. Molly Beerman, our CFO, is ably serving in the role of Interim CEO. I have formed an eight member search committee and have hired a national executive search firm. Work is well underway towards finalizing a pool of qualified candidates, and we hope to name the Foundation's new President and CEO by the end of the fall 2014.

We sincerely thank our donors for their continued generosity and compassion, and our region's nonprofits for their tireless dedication to our community. I am confident that with the help of our philanthropic partners and our elected leaders, we will maintain and exceed our current momentum.



**Edith L. Shapira, M.D.**  
Chair of the Board  
The Pittsburgh Foundation



BRINGING THE BEST EXPERTISE TO BEAR

# THE CENTER FOR PHILANTHROPY



Above: The Pittsburgh Foundation, in partnership with the Ballay Family Fund and LUMA Institute, created a new initiative developed to introduce regional K-12 teachers to the theory and practice of Design Thinking and Human-Centered Design as a way to effect change in public education.  
Right: Patricia Lemer (in red) and Kitty Hillman.

The story of philanthropy began 125 years ago, and it began in Pittsburgh, with Andrew Carnegie's famous 1889 article, "The Gospel of Wealth." Unprecedented industrial wealth was creating dramatic wealth inequality, and Carnegie suggested that the nation's richest citizens had the responsibility to redistribute their wealth to the rest of society.

The seed took, and in cities across the country, philanthropy grew. Nowhere, however, has it taken deeper root than in Pittsburgh, where a culture of philanthropy has flourished and helped the region overcome challenges of virtually every type.

Pittsburgh's most recent innovation in this arena occurred in 2013, with The Pittsburgh Foundation's launch of the Center for Philanthropy, an innovative and broad-based program designed to bring state-of-the-art methods and strategies to Pittsburgh's charitably inclined citizens.

This multi-faceted initiative seeks to maximize a donor's charitable results through education and collaboration with donors, nonprofits, financial advisors, and philanthropic professionals. What is known as "the core approach" includes: analyzing donor values, priorities and goals and using that information to clarify strategies; determining donor giving styles through discussions of risk tolerance and expected outcomes and matching those styles with appropriate strategies; convening stakeholders and partners to build creative alternatives for donors; and providing the best possible training, educational resources and fund management tools.





**“WITH THE CENTER, DONORS ARE ABLE TO AMPLIFY THE IMPACT OF THEIR GIVING BY JOINING FORCES WITH LIKE-MINDED DONORS AND THE FOUNDATION ON KEY AREAS IN THE COMMUNITY. WE’RE BRINGING THE BEST RESOURCES TO BEAR—LOCALLY AND NATIONALLY—TO HELP OUR DONORS ACHIEVE THEIR PHILANTHROPIC GOALS.”**

GRANT OLIPHANT, PRESIDENT AND CEO OF THE PITTSBURGH FOUNDATION

Above: Health and the Environment Giving Circle at Children’s Hospital.

“The basic idea behind the Center for Philanthropy is the product of two major trends in the field,” said Pittsburgh Foundation President and CEO Grant Oliphant.

“One is the desire among philanthropists for more and better information on how to do philanthropy well.” This includes: differentiating among possible grantees to determine which are the most capable of producing the best outcomes; finding the best ways to assess a community’s needs; designing a grant-making program that accomplishes the desired results; helping donors manage family dynamics around philanthropy; and, discerning the best ways to work with financial advisors in philanthropy.

“The second piece driving this is that, as a community foundation, we are seeing that we have this enormous set of donors who are engaged in the community but have very little knowledge or awareness of what we’re doing on the leadership front in the community. So we’re working to create an alignment between donor giving and foundation giving to make a bigger impact in the community.”

With the Center for Philanthropy, The Pittsburgh Foundation is responding to both of these trends simultaneously. It’s taking departments that, in a traditional foundation setting, operate separately and putting them together so that they can work collaboratively with and for donors. This includes the development, communications, finance and program teams.

“We’re working at it,” Mr. Oliphant said. “We’ve been experimenting with this for a couple of years, setting up pilot projects, learning from them and building on them in each case. At this point, we think we have got the model down.

“We’re seeing a fairly sizable demand for assistance on family and inter-generational philanthropy. We’re also seeing a significant interest in what we call ‘co-creation’ programs. That’s a fancy term for the Foundation and donors working together to decide what we want to fund collaboratively.”

The Foundation is working on co-creation in two ways. For very high-end donors, this involves designing programs. And for smaller-level donors, the Foundation has created “giving circles.”

Giving circles involve gathering a group of 15-20 donors who are interested in a particular area or cause. Each of the donors contributes, and the Foundation also kicks in money, creating a larger pool of funds for giving towards a certain area. So far, giving circles have successfully augmented donations in the areas of the environment and poverty, and the Foundation envisions being able to have as many as four giving circles active at one time.

Another key part of the Center for Philanthropy is building the relationship between the Foundation and financial advisors. Advisors play a key role, both with donors and with the Foundation, and the Foundation has been working to strengthen that bond for several years. In 2013, that included graduating the first class in the Foundation’s new Chartered Advisor in Philanthropy program (CAP). CAP builds on an online degree offered through The American College of Financial Services and tailors it to Pittsburgh, offering participants the opportunity to gain both a greater understanding of philanthropy as well as a degree in the field (Please see CAP story on page 18).

“This is a very important part of the Center for Philanthropy because advisors often struggle to talk about philanthropy with their clients,” Mr. Oliphant said. “This gives them the tools to do that.” ■



BRINGING THE BEST AND BRIGHTEST  
TO CITY GOVERNMENT

# TALENT CITY

Last fall, Bill Peduto and Kevin Acklin reached out to The Pittsburgh Foundation President and CEO Grant Oliphant and laid out a problem. Looking ahead to his expected election to the post of Pittsburgh Mayor, Mr. Peduto and Mr. Acklin, now Mr. Peduto's chief of staff, wanted to change the way hiring was done in city government.

"The problem was that they believed that hires at city hall were totally rife from top to bottom with patronage and corruption," said Mr. Oliphant. "The culture throughout the building was that people were hired for no apparent reason other than they knew the right people.

"They wanted to set a different tone, to put a different process in place. They were aware of a program that had been tried in Denver, housed at the Denver Foundation. It used a similar process to what we eventually did—identifying candidates based on merit and qualifications. So we decided to put a program in place for whomever won the election—to use merit-based hiring in selecting the key people for the new administration."

The Pittsburgh Foundation's first step was to research the Denver program and then determine what should be put in place in Pittsburgh. The Pittsburgh process ultimately would differ in two ways. Rather than focus on the Mayor's cabinet, the Pittsburgh project would focus on key department heads and deputies. And the Pittsburgh effort would create three citizen committees, which would screen candidates but not choose the winner. For each job opening, the committees would forward a slate of candidates to the Mayor who would make the final decision.

The first committee created was an oversight committee from a diverse group of people with impeccable credentials; their job was to ensure the integrity of the process and to compose the selection committees. The three selection committees were chosen for their knowledge in three areas: planning and design, public safety and public works, and finance and administration.

After the 2013 mayoral election, The Foundation's initiative, aptly named Talent City, was announced, the web site went live, and the program started taking applications. As of March of 2014, Talent City had completed 30 searches, aided by Development Dimensions International, the Pittsburgh industrial psychology company. DDI designed the necessary competencies for each position and the screening process so that each position would have a series of criteria, giving the selection committees a means of choosing finalists.



Talent City also hired the local search firm, Nonprofit Talent, to perform the searches. Finally, Talent City brought in Predictive Index for psychometric testing, which is increasingly used in hiring to see if candidates are a good match in terms of work style.

“Overall, it has been a very positive experience,” Mr. Oliphant said. “The caliber of the candidates has been excellent, and we were able to present highly qualified people. There have been a couple of missteps. The first appointment the Mayor announced was for finance director, and it turned out to be an individual who had tax liens against him. In that case, the process would have identified that, but the announcement was made before the process was complete. So one of the lessons was, let the process play out.”

For each position, Talent City has sought to provide Mayor Peduto with three to five candidates, some of whom have been from outside of Pittsburgh. “It’s significant that we’ve had so many candidates from outside of the region,” Mr. Oliphant said. “That’s partly because of excitement about the change happening in Pittsburgh and the Mayor’s office, and part of it is because of the way we’ve done the search—people got excited about throwing their hats in the ring. It’s very rare for a mayoral search to be opened up this widely and publicly.”

Mr. Peduto said Talent City showcases “exactly what Pittsburgh needs right now—government working with outside partners to wrest hiring control out of the old boy’s network, and replacing it with a transparent process that finds us great new leadership from all across the country. Pittsburgh is poised

**“I’M THRILLED I COULD BEGIN MY ADMINISTRATION BY WORKING WITH THE PITTSBURGH FOUNDATION AND THE INSTITUTE OF POLITICS TO BRING GLOBALLY RECOGNIZED HR CONSULTING PARTNERS—USING BEST PRACTICES IN EFFECTIVE HIRING AND RETENTION STRATEGIES—TO DESIGN A WORLD-CLASS SCREENING PROCESS TO MAKE PITTSBURGH GOVERNMENT BETTER.”**

PITTSBURGH MAYOR BILL PEDUTO



Above, left to right: Corey Buckner, Sonya Toler, Matt Barron, Bill Peduto and Valerie McDonald.

to once again become a global leader on any number of fronts, and having the first citizen-based hiring process of this scope in the country only underscores that.”

The \$275,000 price tag for Talent City has been paid by local foundations; no taxpayer money was used. The University of Pittsburgh’s Institute of Politics is preparing a report which will be released next year that examines the process. It will chart Talent City’s strengths and also suggest what should be done differently, if the hiring program is repeated.

“There’s a lot of interest in this from other cities around the country,” Mr. Oliphant said. We’d like to share what we’ve learned. There’s also interest among municipalities locally. We have to think long and hard about how we’d do this at a scale we can afford, because it’s not cheap. The key issue is whether the leader wants to use it or fill the jobs in a traditional way.” ■



THE PITTSBURGH FOUNDATION UNVEILS A NEW COMMUNITY LEADERSHIP MODEL

# THE HUNGER INITIATIVE

In November 2013, the leaders of food banks and pantries across the region noticed an alarming rise in demand.

In some neighborhoods, the Greater Pittsburgh Community Food Bank saw demand rise as much as 40 percent over November 2012. The Westmoreland County Food Bank reported that one in six people in its service area qualified for food assistance.

“The uptick in November was very significant, even when we account for the usual increase we expect at that time of year,” said Lisa Scales, CEO of the Greater Pittsburgh Community Food Bank.

The reasons for the spike were numerous but included food program cuts at the state level and the Nov. 1 expiration of a boost to federal food programs. Underlying it all is the fact that many people simply have never recovered from the Great Recession of 2008–2009. For many, wages have not kept pace with the cost of living, so more and more working families need help.

“There was actually a cry coming out from the food pantry and food bank community, saying they were overwhelmed and that significant numbers of families were going hungry,” said Grant Oliphant, President and CEO of The Pittsburgh Foundation.





**"WE ARE ONE OF THE RICHEST NATIONS IN THE WORLD, AND THERE IS A MISCONCEPTION ABOUT WHAT THE FACE OF HUNGER REALLY LOOKS LIKE. MOST OF THE PEOPLE WE SERVE ARE THE WORKING POOR. EVEN THOUGH THEY HAVE JOBS, THEY ARE NOT EARNING ENOUGH TO FEED THEMSELVES AND THEIR FAMILIES."**

KRIS DOUGLAS, CEO OF THE WESTMORELAND COUNTY FOOD BANK

Above, left to right: Volunteers stock the shelves once a month. Beth Frisch, Ilyse Silverman and Abby Ricken-Marks sort kosher from non kosher. Hazelwood YMCA Food Pantry, Albert Dixon and Deborah Thomas. Center: Volunteer Jon Dottle comes once a week to stock shelves and help clients gather their food. Bottom: Volunteers Rebecca and Hannah Carter portioning grain.



In the face of the emerging crisis, a normal foundation response would be to do what foundations are known for doing—providing grant money. And while Grant may be his first name, Mr. Oliphant wanted people to begin thinking of the Foundation in a different way. And the Foundation's response to the hunger emergency illustrates the new thinking.

"We're trying to make a shift," said Mr. Oliphant. "I have been asking our board, staff, donors and supporters not to think of The Pittsburgh Foundation as a traditional foundation, because we're not. Legally, we're actually a non-profit. And our mission as a nonprofit is to bring more people into philanthropy and to support change in our community. We're trying to change our focus so people see us as much more of a community change agent as opposed to a foundation that funds programs. The Hunger Initiative is one model of how that works."

Instead of making a grant to the food banks, The Pittsburgh Foundation mobilized the resources its been gathering for years and unveiled a new leadership model.

Through the multi-year success of its Day of Giving and Pittsburgh Gives programs, the Foundation had created a powerful data base of nonprofit donors. In 2013 alone, 19,000 people gave to regional nonprofits in Allegheny and Westmoreland counties through the Foundation.

"That meant we had access to 19,000 people, and we had this wonderful online giving tool," Mr. Oliphant said. "And finally we have the bully pulpit of the community foundation, where we can put out a call to the community and urge them to do something about this crisis in hunger. We decided to use all these tools instead of just making a grant, and we asked the community to support us in this effort."

The Foundation initially announced it would create a pool of \$100,000, which would match dollar-for-dollar any money the community donated to the two food banks or 15 affiliated food pantries and groups on the Foundation's website. The Foundation could accept donations of \$25 or more and announced that it would also cover the three percent credit card transaction costs for donors. KDKA partnered with the Foundation to help get the word out, and the *Pittsburgh Post-Gazette* donated free advertising as well.

"I thought we'd be lucky to raise \$100,000," said Mr. Oliphant. "The end of the year is a really tough time. Everyone's giving away money, spending money on gifts and caught up in their own year-end activities."

Things, however, didn't turn out as the Foundation expected. Within 48 hours, the Hunger Initiative had raised the initial \$100,000. The Pittsburgh Foundation then doubled its pool to \$200,000. And the gifts kept coming. The Pittsburgh Foundation increased its pool yet again, to \$250,000. And in early January, Pittsburgh Mayor Bill Peduto chose the Hunger Initiative as the charitable beneficiary of the events celebrating his inauguration.

Ultimately the Hunger Initiative raised \$617,804 in four weeks, including 1,400 individual donations and the Foundation match. About \$53,000 went to the Westmoreland County Food Bank, which serves 7,200 households each month. The balance went to the Greater Pittsburgh Community Food bank, which serves 34,000 households a month, and to local food pantries.

"The Hunger Initiative is something we'll do more often in the future," Mr. Oliphant said. "We will put various resources of this Foundation together on behalf of the needs of the community." ■





Above: Rev. Bowen is watching second-grade students learn on an Activ Table. The table has a touch screen surface and was acquired with the help of Rev. Bowen.

## MINISTER GIVES \$200,000 TO THE CHILDREN OF CRAFTON

# A LASTING PRESENCE

Reverend Ed Bowen's future was kindled when, as a high school junior, he sensed a calling from God to head toward the ministry. It was something he had never considered.

That calling ultimately led to a life dedicated to the church, and particularly children. His ministry found its greatest expression with the children of Crafton. And that ministry will live on. After being diagnosed with stage four cancer, Reverend Bowen decided to donate \$200,000 to Crafton children.

His path to God was not immediate. After majoring in accounting and economics in college, he worked in accounting, including two years with accounting firm Arthur Andersen. At the same time, however, he was very involved with youth ministry and felt his calling was being confirmed. So he left accounting and enrolled in the Pittsburgh Theological Seminary.

His first post was Vandergrift's Trinity United Presbyterian Church and a nearby country church, Slickville Presbyterian. During his nine years there, Reverend Bowen formed a community youth club for elementary school children. Though the Vandergrift church had just a handful of children in that age group, the youth club soon was averaging 80 youngsters a week.

It was a model he would build on when in 2000 he went to the Crafton United Presbyterian Church.

"When I arrived, the Crafton church did not have a youth program and probably had about four or five children in worship. The elementary school was only two blocks from the church, and my dream was to have 40 kids a week for the new youth club. I got permission from the school to distribute flyers, and the first week about 80 kids showed up. I felt it was God at work and that God was leading those kids to us. Probably the great majority of them did not have a connection to any other church. They appreciated the chance to come together to take part in the activities."



**“THE MAIN THOUGHT I HAVE IS THAT KIDS ONLY GET ONE CHANCE TO BE A KID. I FOUND THIS WAS A WAY I COULD MAYBE HELP ENHANCE THE LIVES OF THE KIDS GROWING UP IN THE CRAFTON COMMUNITY.”**

REVEREND ED BOWEN



Reverend Bowen soon sought a greater involvement with the school and Crafton. He joined the PTA and volunteered at school activities, and he attended community sporting events, interacting with the parents and children in a different setting.

“I developed deep friendships with a number of the families in Crafton, and people seemed to be very appreciative of the attention our church was willing to give to the children of the community. I just very much enjoyed their company and felt appreciated by the people in the town.”

In 2012, sensing he may have led the Crafton community as far as he could, Reverend Bowen accepted a post with Bates Memorial Presbyterian Church in Huntington, West Virginia. Two months after he started, he was diagnosed with stage four cancer.

“I definitely was stunned,” he said. “The average survival time for this kind of cancer of the small intestine was one and a half years.”

After the diagnosis, he worked for the Bates church another nine months before taking medical disability. And while the work in West Virginia had been rewarding, the people of Crafton had become part of his life, and he missed them. He wanted to continue the relationship and made a \$20,000 gift to the Crafton Elementary School.

School officials, however, hesitated. “Their reaction was they didn’t want to just take the money and spend it,” Reverend Bowen said. “They wondered how we might create a more lasting bond.”

Someone suggested contacting The Pittsburgh Foundation, and Reverend Bowen met with Foundation staff. He increased his gift to \$200,000 and created the Rev. Ed Bowen Charitable Fund for the Children of Crafton. He decided that a local committee—including the school’s principal, two teachers and two PTA members—would decide how to spend the money to the community’s benefit.

“Initially, they kept asking me how I wanted the money spent, and I kept throwing it back to them,” Reverend Bowen said. “I told them, ‘You’re the ones who know the needs.’”

So far, the fund has financed major school playground improvements, including adding play structures and a rubber base surface. Reverend Bowen has helped the school get an ActiveTable, featuring a touch-screen computer. And money also has been used to buy furniture for the school’s STEAM room—for hands-on learning in science, technology, engineering, art and math.

“The Pittsburgh Foundation has been very helpful,” Reverend Bowen said. “They were very ready to answer any questions I had. I think that, from the time we first met until we established the fund, it probably took less than two months to bring that all together.”

Despite undergoing chemo therapy every other Tuesday, Reverend Bowen has been able to keep fairly active, and most of the time he still feels pretty good. Every three or four months, he tries to make a trip back to Crafton.

“They have an annual sixth grade students vs. their teachers basketball game; I’ve volunteered for that and am planning to do it again. And I’ll be back in town for the sixth-grade graduation ceremony.

“A number of classes made me cards and letters and have sent them to me during the past year, expressing their appreciation. And recently, it was my birthday, and they had a school assembly and sang happy birthday. They made a video and sent that to me. It was my 50th.” ■



Above left to right: Rev. Ed Bowen and students.

# YEAR IN REVIEW

## KEEPING ART ALIVE FUND BOOSTS PITTSBURGH’S BLACK ARTS

In 2010, The Pittsburgh Foundation and The Heinz Endowments closed one chapter and opened another in supporting arts in Pittsburgh’s communities of color. After a 22-year collaboration on what was known as the Multi-Cultural Arts Initiative, the two philanthropic groups contributed \$325,000 each and created a new initiative called Advancing Black Arts in Pittsburgh.

“There was a concern that African-American organizations, in particular, face a number of challenges,” said Germaine Williams, Senior Program Officer for Arts and Culture at The Pittsburgh Foundation. “We wanted to be more specific in targeting that population and established this fund that’s more focused on the black experience, including the African-American diaspora.”

In 2013, the fund made \$645,000 in grants to 43 individual artists and arts organizations with the intention of supporting artistic risk-taking, outreach programming, artistic careers and strategies to promote organizational growth.

“Aside from continuing to support individual artists and organizations, we also want to support artists who are helping to eradicate racial barriers and get people to talk openly about race,” Mr. Williams said. “And we’ve seen artists really go on and do amazing things.”

One of those groups and grant recipients is the Balafo West African Dance Ensemble, which teaches and performs authentic West African dance and drumming at a variety of arts venues and schools throughout the region.

The company is led by Artistic Director Kadiatou Conte, a native of West Africa who has performed around the world. The Advancing Black Arts Fund grant has enabled the group of eight dancers and four drummers to bring on Fode Mousa Camara as Musical Director.

“We’ve been working on getting this for years—the security of having an accompanist for rehearsals and to run the rehearsals,” said Frank McNutt, Balafo’s Secretary/Treasurer. “It brings a great deal of professional acumen to all our events. These are really talented artists, and they’re part of many things to keep themselves alive. And we’re part of that.

“We’re really grateful that people at the Foundation see the high level of professionalism and the intent to preserve and present this West African music and dance. In these countries, these are their highest form of artistic expression. We thank the Foundation and will keep working hard.” ●



Above, left to right: Wabei Siyolwe and Balafo West African Dance Ensemble



## YEAR IN REVIEW

### A DIFFERENT KIND OF CLUBHOUSE FOUNDATION FUNDS PROGRAM FOR MENTALLY ILL

For people with serious mental illness, the Howard Levin Clubhouse in Squirrel Hill is a godsend. In the clubhouse, they not only belong, but they can rebuild their lives in an atmosphere of equality.

Jewish Residential Services opened the clubhouse in 2001, and the day program has been growing steadily ever since. In 2013, The Pittsburgh Foundation gave a \$25,000 grant to the licensed and accredited psychiatric rehabilitation facility.

The voluntary day program is one of 300 clubhouses worldwide that are certified by the 50-year-old Clubhouse International program. It's built around the development of a supportive, egalitarian community in which "members" work side-by-side with staff to develop the programming and activities.

"All decisions and all work is done by members and staff together," said Deborah Friedman, Executive Director of Jewish Residential Services.

The program is structured around work; there are different work units, and people choose to participate in one of the units. For instance, there's a food service and horticultural unit, and members work to develop and prepare a lunch every day, doing all of the planning and purchasing on a budget and selling the lunch tickets.

"While working in that unit, they learn food service skills, which they may or may not choose to use to secure employment," Ms. Friedman said. "And they learn pre-vocational skills that anyone needs, such as working as part of a team, meeting deadlines, and operating under a little bit of stress. And we have a wonderful garden in which they grow most of the food they serve all summer and fall."

A business and education unit focuses on providing services to members who feel they're ready to rejoin the work world. And the clubhouse has partnerships with local businesses that offer part-time, paid jobs that last six to nine months. The experience ultimately prepares members to become more independently employed.

The program is open to anyone over 18, and membership typically ranges from the early 20s to over 70. Currently there are 140 active members. "These are people whose mental illness is significant enough and longstanding enough that it has really been very disruptive to their lives," Ms. Friedman said. "Between 60-70 percent of people with mental illness say they would like to join the workforce, but typically 90 percent or more are unemployed. With the clubhouse program nationally, 58 percent re-enter the workforce, and for people with mental illness, that's huge." ●

Below: Randy Hirt, four-year member, helps with Friday night dinner by slicing brisket. Sarah Hughes, Interim Director, oversees.



### BREAKING \$1 BILLION FOUNDATION ALSO SEES RECORD NEW FUNDS IN 2013

For The Pittsburgh Foundation, 2013 was a truly remarkable year. For the first time in its 69-year history, it topped \$1 billion in total assets, becoming Pittsburgh's third billion-dollar foundation, behind The Heinz Endowments and the Richard King Mellon Foundation.

Perhaps more telling and more significant, however, the Foundation also shattered its previous record for new funds.

"The \$1 billion asset size is a wonderful symbol," said Grant Oliphant, President and CEO of The Pittsburgh Foundation. "You can't get too hung up on the number, but it's a symbol of how Pittsburgh has made a commitment to the future of this community over nearly 70 years of history. It also further strengthens our ability to tackle big and important issues that are critical to the well-being of our regional community."

Mr. Oliphant called 2013 "an off-the-hook year." While it wasn't a record year in absolute dollars raised, "it was an extraordinary year in terms of the money that came in from living donors and the number of living donors who joined our ranks. Our previous record for new funds was 76 in 2012, and I told our development team that if they reached the record, I would run through the PPG Place fountain in a suit. We hit 105 in 2013—beating the previous number by almost 40 percent, which is just unheard of in this world. So I'll be in the fountain this summer."

Beating the previous record number of new funds—and by such a wide margin—is a powerful vote of confidence from donors in the Foundation and the economy. As Mr. Oliphant said, "It's an expression of what living donors in the community think about you."

It's also an indication that the Foundation's efforts on many fronts are working. Awareness of the Foundation and the importance of giving to the community are rising. So are efforts to build bridges between the Foundation and financial professionals—of the new funds established in 2013, 45 were referred by local financial advisors. And ultimately, it reflects that the Foundation is succeeding in its efforts to be the place that would-be donors feel comfortable choosing for their investment in charity. ●



Above: Dr. Graham Hatfull, Chair, Charles E. Kaufman Foundation's Scientific Advisory Board.

### KAUFMAN FOUNDATION AWARDS FIRST GRANTS SCIENTIFIC RESEARCHERS AT FIVE UNIVERSITIES RECEIVE \$1.6 MILLION

In July 2013, The Pittsburgh Foundation announced the first series of grants for fundamental scientific research from The Charles E. Kaufman Foundation.

The eight grants from the supporting organization of The Pittsburgh Foundation went to leading researchers at five Pennsylvania universities and represent the first distributions from the remarkable gift of Charles Kaufman, who passed away in September 2010, shortly after his 97th birthday.

A former chemist, Mr. Kaufman left his estate of almost \$50 million to The Pittsburgh Foundation, of which approximately \$40 million was specified to support basic research in chemistry, biology and physics at Pennsylvania universities "for achievement in and contribution to the field and humanity." The gift was the largest in the Foundation's history, and Kaufman's ambition was that his money, gained largely through expertise in investing after he retired, would one day help fund future Nobel Prize winners.

The Kaufman Foundation is led by an eight-member Board of Directors, and proposals are vetted by a seven-member Scientific Advisory Board. The Kaufman Foundation received more than 170 applications and awarded five grants in the New Investigator Research category and three grants in the New Initiative Research category.

The winning researchers are from the University of Pittsburgh and Carnegie Mellon, Penn State, Drexel, and Temple universities. Projects can be viewed at <http://kaufman.pittsburghfoundation.org>. ●



## YEAR IN REVIEW

### BACK TO CLASS

#### FIRST GROUP OF ADVISORS GET CERTIFICATION IN PHILANTHROPY ADVISING

Over the past several years, The Pittsburgh Foundation has been developing closer contacts with regional professionals who are interested in helping their charitably inclined clients. A big step in that direction culminated in the November 2013 graduation of the first class in the new Chartered Advisor in Philanthropy (CAP) program.

“We’ve been trying to provide more meaningful resources to the financial advisor community,” said Yvonne Maher, Vice President for Development and Donor Services. “We’ve been doing a lot of education for donors, but we hadn’t for advisors.”

Foundation officials decided to offer a variation of the online degree offered through The American College of Financial Services. In the Foundation’s version, the professionals enroll in the online course, but the class of 10 meets regularly at the Foundation to exchange thoughts and ideas, to hear from charitable experts and to embark on nonprofit site visits.

The graduate-level course has three parts, each of which culminates in a test. The first focuses on vision and values, and how to have meaningful conversations about charitable giving. The second looks at tools and techniques, including tax benefits and the various vehicles for charitable giving, such as trusts and annuities. And the third part examines the nonprofit sector, including nonprofit boards and the qualities of an effective nonprofit.

“The reaction was really positive overall,” said Ms. Maher. “It certainly involved a time commitment. Many in our first class have had meaningful conversations with clients that they may not have been comfortable with previously. They want to be experts in what they do, and giving them that confidence and the tools they need is hugely valuable.”

Among the first graduates was Scott Oehrle, who founded Marbury Wealth Management in 2000. He’s become increasingly involved with The Pittsburgh Foundation, joining the Professional Advisory Committee and committing to the CAP program.

“The upshot is that it helps you work with your clients more on a ‘why’ instead of a ‘how’ basis,” Mr. Oehrle said. “It’s more qualitative than quantitative. What legacy do you want to leave? Are there certain charitable areas that interest you? Do you want to start during your lifetime? Do you want your family to work together? For my clients who have gotten involved with the Foundation, it’s been all positive.” ●

### “DO GOOD THINGS WITH THIS MONEY” A WESTMORELAND COUNTY FAMILY WORKS TOGETHER FOR CHARITY

For some time after her husband Bussy passed away, Susanna Bowman considered doing something special with some funds on their behalf. After a good bit of discussion, she turned to the Community Foundation of Westmoreland County, and with a \$75,000 gift of HJ Heinz Co. stock, she created the Susanna and Bussy Bowman Charitable Fund.

“My mother-in-law decided she would like to do something for the community,” said Florence Jenkins, of Greensburg, who along with her son J.J. helped get the fund started and are in charge of deciding who the recipients of the fund’s grantmaking will be.

“The process of setting up the fund was very easy,” Florence said. “The people at the Foundation are great to work with. We met with them, and they helped show us what we needed to do. That was pretty much it—we were ready to go. They’re wonderful to work with. They respond quickly and completely, and they’re always pleasant.”

In late March, Susanna passed away at the age of 89. She was a former cafeteria worker, and Bussy worked in the mills, according to Florence, who added: “She told me that Bussy had always said, ‘please do good things with this money.’ That’s what he said, and that’s what she did. She was a very caring person, and she grew up very poor. That’s why we’ve chosen the church and the food banks so far for grants—areas where there is real need.”

Until Susanna passed away, Florence spoke with her mother-in-law every day. Often the fund came up in conversation. “As she heard about things or saw things she was interested in, she’d call us and ask us if these were things we should consider.”

Florence also wants to have the fund be a way of getting her 17-year-old grandson Jorry involved with philanthropy. And when Susanna would call with an idea, Jorry would do the research and find out which organizations would be worthy recipients.

The family wants to keep the fund going and hopes that it’s ultimately taken over by future generations. ●

Below: Florence Jenkins with son JJ Jenkins and grandson Jorrel Jenkins-Smith.



### “WHAT WE’RE LOOKING TO PROVIDE IS AN INSTITUTIONAL QUALITY INVESTMENT PORTFOLIO TO WHICH SMALLER INVESTORS WOULDN’T USUALLY HAVE ACCESS.”

JONATHAN BRELSFORD,  
VICE PRESIDENT OF INVESTMENT FOR  
THE PITTSBURGH FOUNDATION

### A NEW NUMBER ONE THE LEGACY FUND BECOMES THE FOUNDATION’S LARGEST PORTFOLIO

As a response to the stock market turmoil of 2008 and 2009, The Pittsburgh Foundation created a series of new investment vehicles designed to give donors a variety of options depending on their time frame.

The Foundation saw another milestone in 2013, when one of those vehicles—The Legacy Fund—became the single largest pool of assets in the Foundation. The Legacy Fund started in 2009 and was designed as an investment option for donors with a long-term timeframe who want set up a fund in perpetuity that can weather the markets’ ups and downs over time.

“It’s a very proud achievement for us,” said Foundation President and CEO Grant Oliphant. “We created it with the intention of having a set of assets that the Foundation manages as proprietary investment fund, and it’s grown steadily over time.”

Along with giving the Foundation greater control and flexibility, managing the Legacy Fund also forces the Foundation to be more directly accountable for the assets than if it gave responsibility to an outside vendor.

“The fund has performed well—it’s grown from \$123 million to \$267 million,” said Jonathan Brelsford, the Foundation’s Vice President of Investment. Mr. Brelsford oversees the Legacy Fund, and the Foundation’s Investment Committee manages the assets, along with Boston-based consultant Cambridge Associates. “Summer 2008 was an auspicious time to start a portfolio. Since then, the S&P 500 has done exceptionally well—rising more than 100 percent, and 2013 certainly helped. It’s also been operating at a time when the Foundation has received record contributions.”

The Pittsburgh Foundation has a total of 30 different portfolios, of which the Legacy Fund is the largest. The next two biggest are the BNY Mellon Trust and the PNC Trust portfolios. The three together account for 90 percent of the Foundation’s assets.

“We did a very unusual thing here,” Mr. Oliphant said. “At the same time we set up the Legacy Fund, we kept our trust assets with PNC and BNY Mellon, and we’ve continued to add to those trust assets because those relationships are hugely important to us in Pittsburgh. In a lot of communities, they try and break those trust relationships. We didn’t want to do that. Even as the Legacy Fund has become our single largest fund, we also have the strongest relationships we’ve ever had with our trust banks.” ●



Above, left to right: Matt Wagle, Teri Malmstrom, Pete Strobe and Don Kester.



Above: Scott Oehrle and Grant Oliphant.



# YEAR IN REVIEW



## A DREAM COME TRUE PITTSBURGH LURES "EXPERIENCED DREAMERS" TO THE CITY

Two years ago, a public-private consortium of Pittsburgh-area leadership groups announced an unusual contest. The idea was to lure people over the age of 45 to relocate to Pittsburgh to "live their dreams." And the winners would receive \$100,000 to get them started.

The initiative to attract baby boomers (which also gained significant marketing for the region) was spearheaded by Leadership Pittsburgh, with partners The Pittsburgh Foundation, Allegheny County, the City of Pittsburgh, The Heinz Endowments and the Benedum, Buhl, Jewish Health-care and Richard King Mellon foundations.

The contest winner had to have a dream that could come true in Pittsburgh—and would receive \$50,000 to be spent however he or she desired, and another \$50,000 would go to a regional nonprofit. The money would come from The Experienced Dreamers Fund, set up at The Pittsburgh Foundation.

When the contest was announced in late 2011, Tess Lojacono was living in western New York working on her one-person business, Fine Art Miracles, which brought fine art to nursing home and assisted living facilities.

"The elderly is a group I've always had a heart for," said Ms. Lojacono, a native of Mars, Pa. "I really wanted to bring them something that would be lifelong learning and uncover the artist within—everyone has this in them."

While visiting family in Pittsburgh, she drove by nursing home after nursing home and realized Pittsburgh had a high concentration of elderly residents and might be a good place for Fine Art Miracles.

"My mother came to me with this contest and said, 'I think you should enter it.' My husband runs an export company, which he can do anywhere, and he said, 'What do you have to lose?' I dashed off all my answers, wishing I had more time to do a better job before the deadline. I kind of forgot about it -- like buying a lottery ticket."

She became one of 20 semi-finalists and before long, she became one of five finalists. One day, she received a telephone call from Fred Thieman at the Buhl Foundation. "If you win, will you actually move to Pittsburgh?"

Her answer was yes, and after she learned in April 2012 that she'd won, the family had to sell their house, find new schools for their sixth- and seventh-graders and find a new place to live in Pittsburgh by Dec. 31, 2012.

"It was a crazy experience," Ms. Lojacono said "We'd lived a very sheltered life, and we moved into an apartment in Squirrel Hill. It was culture shock for the family—it's a big city here. But everyone's calmed down, and everyone really likes Pittsburgh." And her business is expanding dramatically. In March 2013, she expanded from nursing facilities to all people with special needs and currently serves 125 different local organizations and has hired seven teachers and therapists. Early in 2014, she incorporated as a nonprofit, so she'll be able to receive grants and donations. ●



Above, left to right: Tess Lojacono, founder and CEO, helps John Hayduk paint. Rose Marie Harris painting leaves on a mural. Jane Cinicola, Art Therapist; Julianne Eisel and Tess Lojacono.



## BROWNFIELD RECLAMATION BUTLER COUNTY NONPROFIT RESTORES A WETLAND HABITAT

Above: Saplings and shrubs have been planted and are protected from grazing by wire mesh and plastic tubes. An osprey nest has also been erected on this site.

For years, the Butler County communities of Cranberry, Harmony and Zelienople have discussed and planned a major brownfield reclamation project along the Connoquenessing Creek in Zelienople. To tackle the initiative, they created an all-volunteer nonprofit, the CHZ Composting and Education Center.

The overall plan has been to restore a 30-acre brownfield site on Connoquenessing Creek and Scholar's Run in Zelienople for a multi-municipal composting, recycling and environmental education center. The site, which is near a permanently protected 200-acre nature area, contained three decommissioned water reservoirs, two wooded wetlands, a natural trail connecting to the Connoquenessing Heritage Trail, and an arboretum with native trees and shrubs.

While the composting part of the overall project has been delayed, and may not happen, many other components are proceeding. The overall project involves numerous partners and includes removing a dam, replacing a bridge and restoring land disturbed by those efforts.

In 2013, The Pittsburgh Foundation gave a grant of \$135,499 to support a wetlands enhancement project, which is part of the larger brownfield reclamation. The grant is from the Foundation's Peaceable Kingdom Fund "for animals, both domestic and wild, and the environment in which they dwell."

"It's a brownfield site—a degraded wooded wetlands that needs to be reworked," said Attorney Wesley Hamilton, a long-time volunteer. "The design is that there will be a trail network going through there along the Connoquenessing."

The Pittsburgh Foundation grant is helping with a water treatment facility that will handle and help purify runoff from a variety of sources, including from nearby Northgate Plaza. This includes "slowing down" the runoff water, allowing it to percolate through sand beds and then through multiple pipes where the wetland plants will continue to purify it.

The volunteer CHZ group already has enhanced the area by planting more than 500 trees and shrubs and is also installing a flicker box, wood duck boxes, and an osprey nesting platform. And the area now has a wide array of waterfowl including: osprey, bald eagles, six species of ducks, great blue herons, green herons, white egrets, kingfishers and Canadian geese. ●



## YEAR IN REVIEW



Above: T.J. Reisdorf and Katie Minnock.

### A TRUE PARTNERSHIP FINANCIAL ADVISORS AND FOUNDATION STAFF TEAM UP

Over the last several years, The Pittsburgh Foundation and the region's wealth management community have been finding that, by working together, they can not only further their own goals, but more importantly, provide a new level of service that benefits the clients of each.

T.J. Reisdorf is Vice President and team leader with F.N.B. Wealth Management, and he first came across the partnership possibilities after an attorney friend introduced him to Lindsay Aroesty, Assistant Director of Donor Services and Planned Giving at The Pittsburgh Foundation.

"A few months later, we received a call from a branch manager in Fox Chapel saying there was a client who wanted to discuss estate planning and charitable giving," Mr. Reisdorf recalled. "Our team went out to meet with her, and we asked Lindsay to come with us." The client was interested in establishing a scholarship fund, and Ms. Aroesty discussed the possibilities and next steps with her.

"It worked from the get-go," said Mr. Reisdorf, who has worked in wealth management for seven years. "The client was really impressed with the Foundation and how they could meet her needs from the administrative standpoint and how we could meet her needs from investment standpoint. Now we work together to make sure we get the scholarships funded and to meet the request of the donor,

who has since passed away. It really helped her build a scholarship fund that's going to live longer than my lifetime, I'm sure."

Since then, Mr. Reisdorf has learned more about the Foundation, meeting with Ms. Aroesty every few months and occasionally attending educational events the Foundation holds for financial professional that can be helpful to his clients.

"Everyone wins," he said. "It's a good partnership that meets all the clients' needs. We're both doing what needs to be done for the client and the donor and making sure they get the best service and plan that they can. It gives our clients someone who can really customize their charitable giving, and the Foundation people are very easy to work with." ●

**"THE KEY IS THE PARTNERSHIP—OUR ABILITY TO WORK SEAMLESSLY WITH THE PITTSBURGH FOUNDATION. DONORS AND CLIENTS HAVE THEIR WISHES AND LEGACIES LIVE ON. AND WE HELP THEM ACCOMPLISH THAT GOAL."**

T.J. REISDORF, F.N.B WEALTH MANAGEMENT

### BACK TO LIFE A MAGNIFICENT NEW FOUNTAIN REENERGIIZES POINT STATE PARK

Since its 1974 dedication, Point State Park has seen millions and millions of visitors, and the steady and heavy usage took its toll. In 2006, plans began on a major renovation that culminated in 2013 with the unveiling of a beautiful new fountain.

The \$35 million overall project included: removing barriers between the park and the city, creating an open lawn and festival ground, restoring paving stones, adding lighting and a café, reconstructing riverfront edges and connecting them to a system of trails, and restoring the original landscape of the great lawn by replanting of thousands of wildflowers, shrubs and trees.

The crowning achievement, however, was the new fountain, which opened in June 2013 with a ceremony attended by thousands. Believed to be the tallest on the East Coast, the fountain can shoot water as high as 325 feet but ranges between 80-150 feet because of wind and splash back. It features a raised fountain base, more accessible seating, a cascade waterfall, all new stone paving surfaces, new plumbing and new lighting.

The weekend after the fountain opened, Riverlife President and CEO Lisa Schroeder was looking at the Point from the North Shore. "It was absolutely packed with families who were enjoying the view and splashing in the water. We were all so excited about restoring the fountain and returning it to the city. But I don't think we ever expected people to throng to the Point and use it with such jubilation. It was thrilling to see the Point not only restored as the visual icon of the city but as the center of a whole new definition of quality life."

Grant Oliphant, President and CEO of The Pittsburgh Foundation chaired the Board of Riverlife. The Foundation has supported Riverlife and the Foundation also housed the Friends of the Fountain Fund, which allowed people in the community to donate (the overall project attracted \$9 million in private funds).

"People felt terrific about contributing through the Foundation," Ms. Schroeder said. "Because everyone loves the fountain and The Pittsburgh Foundation has such a great tradition of supporting causes through community involvement."

As Mr. Oliphant said, "The result speaks for itself. We raised a lot of money from the corporate community, thanks largely to PNC's Jim Rohr, the initiative's primary advocate. But we also had a substantial number of individuals contribute as well." ●





## YEAR IN REVIEW

### CLIMATE CHANGE FOUNDATION GRANT FOCUSES ON PENNSYLVANIA'S FUTURE

Despite one of the coldest and snowiest winters in many years, the issue of climate change promises to change Pennsylvania as we know it in the years to come. In order to help educate citizens on the issue, The Pittsburgh Foundation gave a \$75,000 grant to the Allegheny Front radio program for a series of radio and online broadcasts.

“The grant will allow us to really focus on this issue,” said Kathy Knauer, Executive Producer of the Allegheny Front. “We’ll be producing 24 segments and interviews with climate scientists to try to put climate research into perspective.”

The series by Allegheny Front energy reporter Reid Frazier kicked off in March and will examine how climate change will affect Pennsylvania, what’s predicted, how we might adapt to the changes, and what individuals can do to combat climate change.

“Reid also will be looking at alternative energy, at Pennsylvania’s alternative energy policy and how natural gas is affecting that policy,” Ms. Knauer said, adding that a number of the findings may surprise people.

“We’ll be looking at the impact on the ski industry, for example. Scientists are predicting that over the next 50 years, 50 percent of the Pennsylvania ski resorts will be closed because there won’t be enough cold weather to sustain natural snow or man-made snow. And snow is predicted to be a rare event by 2050.”

Other topics will focus on agriculture, how tree species are expected to change and how plants and animals in Pennsylvania will fare in a warmer climate. The 4-7 minute stories will air at 7:30 a.m. Saturday mornings through the fall on WESA and will expand to include social media and a public event for closer citizen engagement, most likely in September.

“It gives everyone a good chance to really dive into a topic that’s important,” Ms. Knauer said. “Climate change can be very complex, and people tend to ignore the problem or not engage in it. We’re trying to bring it to their doorstep so they can understand what it means to them and to Pennsylvania.”

The stories can be viewed at [Alleghenyfront.org/climatechronicles](http://Alleghenyfront.org/climatechronicles).



Above: Reid Frazier interviews Fayette County property owner Fred Cardillo.

### A NEW TAKE ON COMMUNITY DEVELOPMENT PPND CHANGES NAME AND FOCUS

During the last two years, the board of the Pittsburgh Partnership for Neighborhood Development took a long, hard look at its past accomplishments and its focus for the future.

The supporting organization of The Pittsburgh Foundation decided it was time for a new model and a new name—Neighborhood Allies.

“A lot of neighborhoods have become more vibrant and livable with a much better quality of life,” said Neighborhood Allies Program Officer Sarah Dieleman-Perry. “East Liberty is on its way, South Side is doing pretty well, and so is Lawrenceville. But what about the other neighborhoods where we haven’t been as active?”

“There are portions of the city where people are living in distress or transitional neighborhoods. We’re helping those neighborhoods bring about the changes they want to see. We want to develop local leadership capacity, in personal and family wealth building and in public safety. We’re expanding the focus of community development.”



Below: Carpentry class held in the basement of Union Project, a converted church in Highland Park.

### TWEAKING THE DAY OF GIVING SUCCESSFUL PROGRAM SEES CHANGES IN 2013 AND 2014

For the fifth year of the Day of Giving, The Pittsburgh Foundation made some changes designed to bring the charitable event back to its original intent.

Over its first four years, the Day of Giving had grown to the point that, in some sense, it was becoming a victim of its own success. The program originally was intended to attract new donors to nonprofits and to incentivize lapsed donors to come back. In the past few years, however, nonprofits were urging their biggest donors to give on that day, when gifts would get a proportional match from The Pittsburgh Foundation.

“What we had found was that many of the donations were coming in at the \$2,500–\$5,000 level,” said Kelly Uranker, the Foundation’s Director of Donor Education and Philanthropic Resources. “These are typically from major givers and who give regularly.”

It was understandable on the part of the nonprofits, but the program was getting too far away from the original idea—to cultivate smaller and new givers. So the Foundation changed the rules a little. “We instituted a cap on the match,” Ms. Uranker said. “For 2013, the Foundation would match up to the first \$1,000 of an individual donation to each organization. Previously we would match up to any amount with a proportional match.”

The changes were quite effective. The number of donors in 2013 rose to 19,000, up about 2,000, and a long way from 2009 when 900 people donated in the first year. The 2013 Day of Giving raised nearly \$7.7 million for regional nonprofits, similar to the 2012 amount. The \$750,000 match pool from the Foundation meant that donated funds were matched 13 cents on the dollar in Allegheny County and 20.8 cents in Westmoreland County.

In an unrelated change, the 2014 Day of Giving was moved from the fall to May 6 to be part of a national day of giving, including over 100 community foundations across the country. The decision to hold a national day of giving—called “Give Local America”—was based on the success seen in a number of cities, including Pittsburgh. Holding a national event also will allow the community foundations to benefit from national marketing. ●

One thing that hasn’t changed is The Pittsburgh Foundation’s support. In 2013, the Foundation made a \$175,000 grant to Neighborhood Allies, and the group used that money to run its own grant program. Called the Catalytic Grant Program, its purpose was to find community groups making changes in their neighborhood that needed start-up assistance or help getting to the next level.

“If an idea was too new or early to get traditional foundation support, then we could help bring that idea to fruition” Ms. Dieleman-Perry said.

In 2013, Neighborhood Allies made 30 grants in three rounds of \$300,000–\$400,000 each. One grant was to the

Manchester Youth Development Center, which has a charter school for elementary students and a long waiting list. The grant will help them expand the school to serve more youngsters.

Another went to the North Side Coalition for Fair Housing, which is combating vacant homes and lots by partnering with a developer to apply for low-income housing tax credits from the state. “The twist is that the people who will live in these units will have the opportunity to rent to own and further stabilize the neighborhood,” Ms. Dieleman-Perry said. “There’s a physical piece but also a people piece.” ●



## YEAR IN REVIEW

### DR. KAREN HACKER TAKES OVER COUNTY HEALTH DEPARTMENT PITTSBURGH FOUNDATION OFFICIALS OVERSEE THE NATIONAL SEARCH

When Allegheny County Executive Rich Fitzgerald needed help finding a new director for the Allegheny County Department of Health, he turned to board of health member Dr. Edie Shapira, who also chairs the board of The Pittsburgh Foundation, and Grant Oliphant, the Foundation's President and CEO.

Dr. Shapira and Mr. Oliphant co-chaired the eight-member, blue-ribbon search committee, which also included board of health members Dr. Lee Harrison, Dr. Don Burke and Dr. Joylette Portlock, and community members Dr. Loren Roth, Peg McCormick Barron and Mark Cherna. They conducted a thorough national search, vetting numerous qualified candidates. One, however, consistently stood out—Dr. Karen A. Hacker, who accepted the post in May of 2013.

An Evanston, Illinois native, she came to Pittsburgh from Boston, where she was a Harvard Medical School Associate Professor and Executive Director at the Institute for Community Health, a public health research organization within the Cambridge Health Alliance. Dr. Hacker received an undergraduate degree from Yale University and a medical degree from Northwestern University Medical School. She did her residency at Boston City Hospital.

“We set an extremely high bar for this search, because when it comes to public health, the residents of Allegheny County deserve the very best,” Mr. Oliphant said. “We set out to find someone with impeccable medical credentials, a strong appreciation for environment health, and a practical understanding of how to create a state-of-the-art health department.

“It was a huge amount to ask for, and I could not be more pleased that we were able to attract Karen to Pittsburgh. And I couldn't be more pleased with the job she's doing. I think she's an exciting leader, and I also think it's great that she's a woman leader. She's bringing high degrees of professionalism and transparency to public health in our community.”

Dr. Ron Voorhees served a year as Acting Director of the health department, following the departure of the late Dr. Bruce Dixon, who was the longest-serving Director in the history of the Allegheny County Department of Health. ●

**“WE HAVE MANY CHALLENGES BEFORE US AS WE WORK TO IMPROVE AIR QUALITY AND INFANT MORTALITY STATS AND REDUCE OBESITY AND VIOLENCE IN OUR COMMUNITY. I AM POSITIVE THAT DR. HACKER IS THE RIGHT PERSON TO MEET THOSE CHALLENGES.”**

ALLEGHENY COUNTY EXECUTIVE RICH FITZGERALD



Above: Dr. Karen Hacker  
Right: Neil Alexander. WTAE's Chronicle, an episode dedicated to ALS; a telethon during the episode raised over \$145,000 for the LiveLikeLou Fund.

### FACING ADVERSITY LIVELIKELOU.ORG HITS FULL STRIDE

It's been two and a half years since Neil Alexander started a fund at The Pittsburgh Foundation, turning the curse of his medical diagnosis into a blessing for others.

After Mr. Alexander was diagnosed with Amyotrophic Lateral Sclerosis (ALS), long known as Lou Gehrig's Disease, he made a decision to “Live Like Lou,” emulating the New York Yankee Hall of Famer, known before his diagnosis as “The Iron Horse” for his durability and after, for his immortal “Luckiest Man on the Face of the Earth” speech.

Since starting the LiveLikeLou.org Fund at The Pittsburgh Foundation in December 2011, Mr. Alexander and his family have not only learned to cope with the disease but have raised over \$1 million and begun investing in research towards finding a cure, including a \$100,000 grant co-created with The Pittsburgh Foundation over two years to Dr. Robert Friedlander, who leads a UPMC research team.

“We wanted to make sure that the grant went directly to the lab,” Mr. Alexander said. “Really, the only ALS research



team in town is Dr. Friedlander's. We went to him and said, ‘We want to put a body in the lab to work on your next best idea.’ The Pittsburgh Foundation decided to match our grant. So for the next two years, Dr. Friedlander will receive \$25,000 a year from LiveLikeLou.org Fund and \$25,000 from the Foundation.

Through LiveLikeLou.org Fund, Mr. Alexander also has raised local awareness of ALS dramatically, giving presentations to a variety of groups, including medical professionals, holding three annual events and getting significant coverage in the news media. The word has spread to the extent that a trend has arisen at children's birthday parties at which donations to LiveLikeLou.org Fund are suggested in lieu of gifts. And occasionally, the doorbell will ring at the Alexander home in O'Hara and an eight-year-old will be holding \$60 from a lemonade stand. “It's brought us to tears several times,” Mr. Alexander said.

In June 2013, Alexander stepped away from his job at Hefren Tillotson, going on permanent disability and spending his energy on LiveLikeLou.org Fund despite the progression of the disease.

“I walk with great difficulty, but I still do. My hands and arms are getting fairly weak, so I use software to control the computer with my voice. My breathing capacity has weakened, but I'm pretty much unaffected from the shoulders up. I'm still able to speak well and make presentations, which is a blessing.”

July 4, 2014 marks the 75th anniversary of Gehrig's farewell speech. “LiveLikeLou.org was born from that speech, and a feeling of gratitude. After we picked ourselves up off the floor, we realized this could be a lot worse. We're not alone. My wife, Suzanne, and I are incredibly grateful for the reaction the community has had to LiveLikeLou.” ●



## YEAR IN REVIEW

### BRIDGING THE GAP PITTSBURGH SYMPHONY MUSICIANS CREATE FUND TO HELP LOCAL SCHOOLS

It used to be that when the Pittsburgh Symphony Orchestra put on a Heinz Hall concert for schools, the school busses would be lined up outside, and inside the house would be full. Recently, however, the musicians noticed an increasing number of empty seats.

When a group of PSO musicians started talking with teachers in the public schools, they learned that because of budget cuts many schools could no longer afford the busses, and their music programs also lacked funds for musical instruments, instrument repairs and sheet music.

“So we just got motivated and said, ‘There’s not a lot we can do, but we can do concerts, raise money and create a fund,’” said Edward Stephan, Principal Timpanist with the PSO and Percussion Department Chair at Duquesne University. And that’s exactly what they did, setting up the Pittsburgh Symphony Orchestra Musicians Care Fund at The Pittsburgh Foundation.

“We played our first concert in October and raised \$15,000. It exceeded our expectations. And Keith Lockhart, Principal Conductor with the Boston Pops, gave his time and services at no cost for that first event. The Pittsburgh Foundation provided an additional \$10,000 in funding, and another \$13,000 was raised from our most recent concert in Upper St. Clair.”



Above: Andrew Wickesberg (Viola), Susan Park (Violin), Chad Winkler (Trumpet), Edward Stephan (Principal Timpanist), Christopher Wu (Violin).

The plan now is that the PSO musicians will do one big concert a year and one or two smaller chamber events as fundraisers and the musicians expect the fund will continue to grow. The idea has attracted national interest, and some of the country’s biggest orchestras have expressed an interest in helping.

“This is a big virtuoso orchestra—you can’t go anywhere in the world and hear an orchestra that’s better,” Mr. Stephan said. “And yet, here we are in Pittsburgh, so we really do want to give back to the community and keep the cultural life strong, especially with the young kids.”

Through its grants so far, the fund has repaired \$2,500 worth of instruments at Washington High School and bussed 161 elementary school kids to a youth concert at Heinz Hall. And Mr. Stephan expects to award an additional \$25,000 in grants in 2014. All of the 99 PSO musicians have been involved.

“The overwhelming reaction is it’s the most rewarding thing we’ve done in a long time. We met with the kids after they arrived, and the band director at Washington High gave a speech at our last concert that was very moving. If this first year is any indication, we’ve certainly seen the need is there and people are moved by it. With those two things, there’s no reason why we wouldn’t continue.” ●

### A TRANSFORMATIVE STAY LATROBE SHELTER HELPS MEN GET ON THEIR FEET

When the Union Mission has specific needs it can’t meet through traditional sources, it turns to the Community Foundation of Westmoreland County.

The only shelter for homeless men in Westmoreland County is best known for its four-month program designed not only to provide shelter but to help its guests make a successful transition back to the community. Recently, however, the Union Mission was experiencing a long waiting list, and the Community Foundation of Westmoreland County helped the Mission add four beds.

Left: James, a resident of Union Mission, reads in his quarters.

### “I WAS VERY FORTUNATE TO HAVE DR. KRIVAK AS MY DOCTOR. HE IS SO CARING—THE MEDICAL PROFESSION COULD LEARN FROM THIS MAN.”

SUSAN EVANS



Above: Dr. Tom Krivak and Susan Evans

“Originally, we hoped that adding the four beds would alleviate the waiting list, but it didn’t,” said Dan Carney, Executive Director of the Union Mission. “We still had guys waiting three or four weeks to come into the program. We felt an obligation morally to help them in the short term. We don’t want them sleeping out on the streets.”

So the four new beds became an emergency shelter program. Men stay no more than five days, receiving basic amenities as well as base-level case management support. During these short stays, the Mission tries to find the men other temporary housing, including family members and other venues, before they are able to enter the longer-term program.

“Typically they find a short-term space to offset that wait,” Mr. Carney said. When the men enter the longer program, there is a weekly scoring system, and men “earn” the ability to stay, in 30-day increments. During that time, they receive case management, counseling, and life skills. There is also a spiritual component.

“We’re trying to focus on the whole person,” Mr. Carney said. “There’s a lot of victimization that’s gone on—and a lot of past trauma. They’re with us the first 21 days on lock down; they can’t leave the property. That helps with the first stages of recovery and with stabilization if they’re having a mental health crisis.”

After that, the focus turns to income, with residents making a resume, having mock interviews, and gathering references. They talk through how to overcome a criminal record and discuss strategies for dealing with other problems including drugs and alcohol.

“We have only an eight percent recidivism rate compared 44 percent nationally,” Mr. Carney said. “We think that’s because of the culture we try to build here. When they leave, it’s not just thank you and goodbye. A lot of guys come back and volunteer. They come back for aftercare and counseling and for Bible studies. They have that root, and that helps keep them stable longer.” ●

### LESSONS LEARNED SURVIVING CANCER BOOK TO HELP RESEARCH

For Susan Evans, a persistently swollen ankle that defied explanation was the only symptom that would lead a year later to a much more serious diagnosis. The retired high school English teacher from Bradford, Pa. was given shoe inserts and elastic socks to no avail. Finally, a doctor suspected something else was happening, and, after a scan, in June 2012, Susan was told she had ovarian cancer.

“They said, ‘You have a 25-pound tumor,’” Susan said. “That’s as big as a Thanksgiving turkey!” A family doctor then told her she had six months to live. Much of the information was incorrect. The tumor was 2.5 pounds—someone had misread the chart—and Susan has long outlived the early prognosis and is in remission. “I’m going to Pittsburgh,” where she and her husband George, the retired chair of the Mass Communications Department at St. Bonaventure University, keep a home in Cranberry.

For the Evans, that was the turning point. At Magee-Womens Hospital, she was under the care of Dr. Tom Krivak, and during treatment, she decided to do two things—write a book about her experience and set up a fund at The Pittsburgh Foundation to help Dr. Krivak further his research of ovarian cancer.

Susan collaborated with Dr. Krivak on the book, “Don’t Write the Obituary Yet,” and she wants any proceeds to help Dr. Krivak’s work, now at West Penn Hospital. In order to do that, she researched the best place to set up a fund. After a few hospital-related foundations weren’t a good fit, Susan contacted The Pittsburgh Foundation. And just before Christmas, she and George started the Evans-Krivak Gynecological Cancer Research & Education Fund with a \$10,000 gift.

“Very little was involved in getting started,” Susan said. “It was the easiest process, because they absolutely know what they’re doing. It’s been wonderful working with the Foundation.”

One main point Susan wanted to make in writing the book is to let other women know they can and should be assertive during the medical process. “Just because you’re in that hospital gown that’s so unattractive, it doesn’t mean you don’t have the right to say what you want. Too much with the medical profession, we listen to them instead of their listening to us.”

For Susan, increasing research of ovarian cancer is vitally important. “It doesn’t get the money that breast and lung cancer and others do—it’s the orphan cancer. About 14,000 women a year die from it, and it’s very hard to diagnose. There’s a blood test, and it’s not foolproof, but that’s all there is. And I feel in my heart that if someone saves your life, you owe them something.” ●



## YEAR IN REVIEW

### THE PITTSBURGH PROMISE

If you look at the numbers, The Pittsburgh Promise is a promise kept. To date, the Promise has sent more than 4,700 students to college on scholarship, and so far, more than 700 have graduated from 2- or 4-year programs. At least 400 have gained employment in the Pittsburgh market (there are likely more, but after receiving their last tuition check, students aren't required to stay in touch).

"It's exceeding what we expected," said Saleem Ghubril, the Promise Executive Director for six years. "To me, the part that is most joyous and significant is the retention rates. The early criticism was, 'You're taking urban kids who aren't prepared for college; you're giving them money for higher education; you're throwing good money after bad.' The data, however, show that our kids are outperforming and out-persisting every cohort of kids at every time of post-secondary education."

Mr. Ghubril referred to analysis done by the University of Pittsburgh's Learning Research and Development Center, which highlighted the results. "When the LRDC first showed me those notes, I said, 'Are you sure? Are you counting the numbers accurately?' And the answer is yes."

Mr. Ghubril cited three reasons why "Promise Scholars" are doing so well in college. "The reforms at the Pittsburgh Public Schools are gaining traction. While it's not perfect on every front, it is better preparing kids for post-secondary success. Second, the Promise has raised the aspirations that kids have for themselves and that parents and teachers have of them. Finally, the Promise is making it

## "NEARLY 85 PERCENT COME FROM LOW- TO MODERATE-INCOME FAMILIES WHO WOULD HAVE TO BORROW TO PURSUE HIGHER EDUCATION OR NOT GO AT ALL."

SALEEM GHUBRIL, EXECUTIVE DIRECTOR OF THE PITTSBURGH PROMISE

possible for kids to stay in school—so that money is not the reason they're leaving school."

The Promise was created when, in 2007, UPMC provided \$100 million for scholarships pledged over 10 years for city public school graduates meeting performance standards if the region could raise \$150 million for the Promise in the same period.

So far, the Promise team has raised \$72 million with \$78 million to go by 2018. But with a veteran staff and board, the Promise is embarking on an ambitious goal—to finish its fundraising three years early—by the end of 2015. The acceleration is being driven by retired Mellon Financial Corp. Executive Marty McGuinn, who with his wife Ann, has given \$1 million, the largest individual donation to date. The McGuinns and Giant Eagle's David and Cindy Shapira are chairing the institutional giving campaign; Peter Mathieson and Huntington Bank President Susie Baker Shipley are chairing individual giving; and UPMC's Candi Castleberry-Singleton and Susan Paine are chairing the grassroots campaign.

"The idea is to give donors a break," Mr. Ghubril said. "In other words, 'Why don't you go ahead and make a multiple-year commitment instead of our coming back?' We want to let families who are planning for the future to know that the Promise will be there. It's a very heavy lift. However, having raised \$72 million in a six-year period that included the worst economic climate in our nation's recent history speaks volumes about the generosity of our community." ●

### ALL IN THE FAMILY THE MILLERS CELEBRATE A MILESTONE

If there is a prototype of a family company, Brookville's Miller Welding and Machine Company is it. It was started in 1963 by David R. Miller, now 81, and he and his wife Sara, 82, still go to work there every day. So do five of their six children and seven members of the third generation.

The story began when David Miller worked as a welder at General Electric in Erie. He wanted to come back to Brookville, but jobs were scarce. With five children and a sixth on the way, he envisioned starting a company with his brothers that could last for generations.



Above, left to right: Bradley Miller, Pamela Lindermuth, David Miller, Sara Miller, David Miller, Terri Klatko, Jeffrey Miller.



Above: Sustainability coordinator James Stitt and Interim Executive Director James Good review plans for Schenley Park.

Miller ultimately made it happen, working six days a week and telling his children, "I'm doing this to provide a future for you guys, if you want it fine; if you don't, fine too."

"He'd talk to us about what was going on," said son David, the first born and now President of the 450-employee parts manufacturer for the construction industry. "We lived this business—that's why six of the seven grandchildren and another by marriage are still involved."

In 2013, the Miller family wanted to do something to honor David and Sara on the occasion of the company's 50th anniversary.

"One of our challenges is to get employees and people in general interested in manufacturing," said the younger David. "Everyone's being told that manufacturing is a dying industry, and they're making career choices that don't bring people into the manufacturing world. Mom and Dad are very humble people. They don't like a lot of attention brought to them. Materially, they don't need anything. One thing they saw to was that we all got the opportunity for the education that we chose. So we thought it would be fitting to establish a scholarship that would provide funds for some of our employees."

David called an attorney and explained what he and his siblings were thinking, and the attorney suggested they call The Pittsburgh Foundation. The Foundation helped them establish the David R. and Sara G. Miller Scholarship, which was started with a \$50,000 gift to provide scholarships for the children of employees who are going to a trade school or university focused on manufacturing.

"It was super simple," David said. "I was surprised at just how easy it was to set it up. The Foundation staff asked us about our intent and what our thoughts were. And once we got that straight in our own minds, in practically a day, it was done. I couldn't have been more pleased with the way the process went." ●

### FINDING GREEN SOLUTIONS FOUNDATION GRANT HELPS TACKLE REGIONAL SEWER ISSUE

Pittsburgh has a sewer problem. In many places, its sanitary sewers, which carry waste, and its storm sewers, which carry rain, are combined. And whenever there's a strong rain, the influx of water overwhelms the sewage treatment system, and untreated raw sewage flows into the rivers.

For years, the region has been under a consent decree from the Federal Environmental Protection Agency to stop violating the Clean Water Act and fix the combined sewer overflow problem, which is estimated to cost upwards of \$2 billion.

In 2013, The Pittsburgh Foundation granted \$50,000 to the Pittsburgh Water and Sewer Authority (PWSA) to enhance its ability to implement green technologies to reduce the amount of rain water getting into the sewer system.

The PWSA will be testing these technologies in a three-year pilot project in the Sawmill Run watershed in southern Pittsburgh. "We're looking at installing tree boxes, swales, rain gardens—we're looking at everything," said Jim Good, interim Executive Director of the PWSA since July of 2012.

"We picked Sawmill Run because it has many water quality issues—not just combined sewer overflows. Sewers from a number of communities flow into it, not just Pittsburgh, and the EPA has asked for more interregional cooperation.

"What we learn in Sawmill Run, we can use throughout the city. We'll be able to go back to the regulators and show them what works and to what level it works. Green infrastructure has been effective in other communities, but every local landscape is different. So you can't just copy what was done in Portland and apply it here. We have to take into account the local topography and soil types."

The project is just getting under way, and it will likely be next spring before people see any actual green infrastructure in place. The pilot, however, means developing new expertise for the PWSA, which traditionally is in the business of designing water and sewer mains and water pumps. The Pittsburgh Foundation grant—along with grants from The Heinz Endowments and the Richard King Mellon and Colcom foundations—is helping PWSA build a sustainability team of four full-time people.

"Without the support of the foundations, it would have been difficult, if not impossible, to do much of this on the time frame we wanted," Mr. Good said. "They've been an integral part in making this happen relatively quickly and on a large scale." ●



## ESTABLISHING A FUND

### WHAT IT ENTAILS

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

Endowment funds held by the Foundation range from \$10,000 to \$40 million, created by individuals and organizations, which exist in perpetuity, growing each year, to provide an ever increasing resource to benefit the community.

In 2013, the Foundation and its Supporting Organizations awarded almost \$43 million in grants to a vast array of nonprofit organizations, students, scholarships, and medical researchers, based on donor interest and specific purposes of individual funds.

### OUR PURPOSE

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

### WE HAVE THE EXPERTISE

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

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

### WHO ARE OUR DONORS?

As a community foundation, our resources comprise endowment funds established by individuals, families and organizations with a passion for Pittsburgh and a deep commitment to our community. The Foundation has more than 1,900 individual funds and our donors give in a variety of ways during their lifetime and thereafter.

More information on funds at The Pittsburgh Foundation and sample agreements are available by calling the Development and Donor Services Department at 412.394.2653

Credit card donations may be made via the Foundation's web site at: [www.pittsburghfoundation.org](http://www.pittsburghfoundation.org)

To contribute to THE PITTSBURGH PROMISE, checks may be made payable and sent to:  
The Pittsburgh Foundation  
The Pittsburgh Promise Fund  
Five PPG Place, Suite 250  
Pittsburgh, PA 15222

**DONOR ADVISED FUNDS** allow the donor to recommend grants to specific nonprofit organizations. These organizations must be bona fide nonprofits and are subject to approval by The Pittsburgh Foundation's Board of Directors. The original donor may also determine what the purpose of the fund will be after the donor's death, or may appoint future advisors (successor advisors) who will advise on its distribution annually.

**FIELD OF INTEREST FUNDS** provide grants within the overall direction of the donor's areas of interest. This type of fund allows donors to support a broad area of concerns. For example, a donor may be interested in having the fund address grant making that benefits children, the arts or the elderly. Specific charities would not be named, but all grants from the fund would be directed toward programs that address the field of the donor's interest within the greater Pittsburgh region.

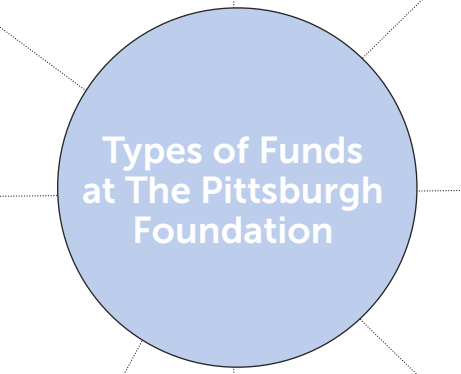
**AGENCY ENDOWMENT FUNDS** are permanent endowments established by local nonprofit organizations to provide ongoing unrestricted support for the organization's programs.

**SCHOLARSHIP FUNDS** benefit students throughout the United States. Most frequently, donors established funds that assist high school seniors seeking post-secondary education. There are, however, funds that focus on college, graduate or technical school students who are pursuing specific areas of interest. Donors may choose the type of assistance they would like to provide, whether to help pay tuition or purchase school-related items such as books and computers. Some funds have been created to assist elementary school children in obtaining music lessons.

**DESIGNATED FUNDS** allow the donor to specify eligible nonprofit organization(s) to receive annual grants. This is a commitment to one or more specific organizations. Should the organization(s) cease to exist after the donor's death, the Foundation will honor the donor's original intent by making grants to a current existing organization with the same mission or purpose.

**MEDICAL RESEARCH FUNDS** are established by donors to support investigation into the cause and cure of a variety of diseases. The Foundation's Medical Research Advisory Committees, composed of physicians and researchers, review proposals and make recommendations of worthy projects to the Foundation's Board of Directors for approval.

**UNRESTRICTED FUNDS** have been established by donors to allow the Foundation to respond to community needs now and in the future. Grants from these funds support Allegheny and Westmoreland County nonprofit organizations that address the basic needs of vulnerable populations, as well as supporting public education, environmental advocacy, community and economic development, research and civic engagement and creating a vibrant cultural sector.





## NEW FUNDS 2013

### THE PITTSBURGH FOUNDATION AND COMMUNITY FOUNDATION OF WESTMORELAND COUNTY

Michael T. Abel Memorial Scholarship Fund  
Edward and Joan Aiello Family Fund  
Mary Louise Amer Fund  
Anonymous Fund #10  
Anonymous Fund #12  
Balog/Bonino Family Fund  
Samuel and Claire Bell Trust Fund  
Benedek Family Fund  
Hollen Bolmgren Fund  
Rev. Ed Bowen Charitable Fund for the Children of Crafton  
Susanna and Bussy Bowman Charitable Fund  
Elizabeth R. Bradley Fund  
Agnes Wynona Breedon Memorial Scholarship Fund  
Carol A. Brown Memorial Scholarship Fund  
Butler County 4-H Endowment Fund  
Catz Family Fund  
James C. Chaplin, IV and Carol C. Chaplin Charitable Fund  
Linda Christen Family Charitable Fund  
Thomas M. Colella & Florence M. Colella Memorial Foundation  
Shirley and William S. Conover Fund  
Constandy Memorial Trust #1  
Constandy Memorial Trust #2  
Don Conte Memorial Fund  
George H. and Susan D. Craig Fund  
E.J. and Lu Donnelly Fund  
Anita Doyle Memorial Scholarship Fund  
East Allegheny Student Aid Scholarship Fund  
East End Community Fund  
Bill and Connie Enos Enrichment Fund  
Evans-Krivak Gynecological Cancer Research & Education Fund  
Experienced Dreamers Fund  
William H. Feller and Edna B. Feller Scholarship Fund  
Regan Fetterolf Fund  
Andrew Fisher Memorial Fund  
Forgas Family Charitable Fund  
Helen and Harry Fouts Memorial Trust Fund  
Russell and Nancy Fuhrer Fund  
William and Ann Garrett Fund  
C.D. Gates, Jr. and Dr. Rebecca Gates Scholarship Fund  
Golden Tornado Scholastic Foundation/James Mullner Memorial  
Goodworth Family Legacy Trust  
Gott Family Foundation Fund  
Graf Family Charitable Giving Fund  
Frederick V. Hoyet Sr. & Jr. Memorial Scholarship Fund  
Irvin Family Foundation Fund  
Irvin Family Fund  
Robert and Bernice Kaufman Fund  
Suzette F. Keefer Fund  
Pat Kelly Memorial Scholarship Fund  
Charles E. Kester Memorial Fund  
Patti A. Kothmann Memorial Fund 1  
Patti A. Kothmann Memorial Fund 2  
Paul M. Sr. & Mildred F. Kridlo Fund  
KSNL Pendyala Family Fund  
Geri K. Kuremsky Fund  
Lee Family Fund  
Walter Limbach Family Fund  
Elsie O. MacKenzie Fund  
Mars Area School District Scholarship Fund  
Celeste and Anthony Massaro Fund  
Joseph A. Massaro Alzheimer's Research Fund  
Joseph P. Matteo Fund  
Alice McCaffrey Scholarship Fund  
Mendelow and Rossman Memorial Fund  
Meshanko Memorial Scholarship Fund for CCAC  
Meshanko Memorial Scholarship Fund for Springdale H.S.  
Meshanko Memorial Scholarship Fund for St. Tikhon  
Meshanko Memorial Scholarship Fund for St. Vladimir  
David R. Miller and Sara G. Miller Scholarship Fund  
Charles and Lois Mitsch Philanthropic Fund  
Charles and Lois Mitsch Philanthropic Fund #2  
Mohr Family Fund  
Robert L. Morelli Foundation Fund  
Nate's Mates Fund  
Thaddeus Niemiec and Daniel Quinn Fund  
Pittsburgh Symphony Orchestra Musicians Care Fund  
Porter Family Trust Fund  
Bob and Chris Rath Fund  
Rodgers Fleischel Charitable Fund  
Jack Ryan Charitable Fund  
Jeffrey R. Sankey Fund  
Harv and Laurel Saylor Charitable Fund  
Schaughency Family Fund  
Semensky Scholarship Fund  
Jean Stalder Fund  
Gary and Mary Ann Sedlacek Fund  
Terry and Janet Serafini Fund  
Siewiorek Walker Family Charitable Fund  
Sylvia and Martin Snow Charitable Foundation Fund  
Southern Club of Pittsburgh Fund  
St. Paisios and St. Ephraim Fund  
Swartz Girard Family Fund  
Kermit B. Thomas Cambria County Historical Society Museum Fund  
Kermit B. Thomas Camp Living Waters Fund  
Kermit B. Thomas Christian Home of Johnstown Fund  
Kermit B. Thomas Ebensburg Area Clergy Fund  
Kermit B. Thomas Mt. Herman Cemetery Fund  
Kermit B. Thomas New Day Fund  
Kermit B. Thomas Salem Church Fund  
Kermit B. Thomas Young People's Community Center Fund  
TJ Arts Fund  
David and E. Gay Travaglio Fund  
Alan and Mary Beth Trivilino Family Fund  
Robert and Anne Tumbas Memorial Fund  
I. Keith and Brenda L. Vail Fund  
Vandeventer Scholarship Fund  
Walker Siewiorek Family Fund  
John and Robin Wagner Family Fund  
Janey L. Waldman Ovarian Cancer Research Fund  
We Say No More to Domestic Violence Fund  
Westmoreland County Community Revitalization Fund  
Westmoreland County Housing Authority Scholarship Fund  
Richard and Barbara Wukich Family Fund

## ADVICE AND GUIDANCE

The Pittsburgh Foundation is deeply grateful for the thoughtful advice and guidance provided to the Foundation and its supporting organizations by members of our community. For a full list please visit: [www.pittsburghfoundation.org/guidance](http://www.pittsburghfoundation.org/guidance)

### 2013 LEGACY SOCIETY

The Legacy Society recognizes donors who have named The Pittsburgh Foundation in their estate plans. For details: [www.pittsburghfoundation.org/legacy\\_society](http://www.pittsburghfoundation.org/legacy_society)

### CONDOLENCES

#### OUR SYMPATHIES AND CONDOLENCES GO TO THE FAMILIES OF THE FOLLOWING DONORS WHO PASSED AWAY IN 2013:

Barbara G. Aaron  
Thomas W. Angerman  
Robert L. Becker  
Donna Bolmgren  
Jean G. Bowman  
Carol A. Brown  
John E. Brownell  
Gibson P. Buchanan  
Edward S. Churchill  
Margaret E. Clark  
George B. Cushing  
Frank Demma  
Ruth Evans  
Lee C. Gordon  
Bruce E. Haney  
Caroline F. Holdship  
Thomas O. Hornstein  
George L. Illig  
Shirley L. Kerchner  
Michael Kostek  
Vivian Krall  
Helen W. Lang  
Catherine B. Lyon  
Rita M. McGinley  
Ann M. Miklos  
Claire Pyle  
William F. Saalbach  
Martha L. Schove  
Seymour A. Sikov  
Jean Stalder  
Edna A. Weimann  
John Whitaker

## JAN VISH

Sympathies and condolences from the staff and Board members of The Pittsburgh Foundation go to the family and friends of Foundation staff member Jan Vish who passed away after being taken ill at her home in February, 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 husband, Dom and son, David. Jan passed away shortly before her and Dom's 50th wedding anniversary. She was an active member of the North Hills Alliance Church where many Foundation staff and Board members attended a memorial service.





## APPLYING FOR A GRANT

The Pittsburgh Foundation comprises several types of funds that award grants in different ways. Our donors have created funds to support designated agencies; to provide scholarships to students who attend specific schools; to support medical research and to address specific fields of interest. Donors also choose to establish funds whereby they can advise on grantmaking from their funds subject to the approval of the Foundation's Board of Directors. The Foundation does not accept grant applications for designated/donor advised funds.

Other donors have established endowed funds where the charge to the Foundation's Board of Directors is to "meet community needs as they arise." These funds are known collectively as The Pittsburgh Foundation Community Endowment.

The mission of the Program Department is to foster sustainable communities, defined as those which seek to seamlessly integrate economic, social equity and environmental goals in order to enhance the quality of life for residents of the Pittsburgh region. Sustainable communities can be identified by the presence of:

- Self Sufficient Individuals and Families;
- Healthy Communities; and
- A Vibrant Democracy

The first includes education, affordable housing, public transportation, healthy children and adults and job development. Healthy Communities covers ecological issues, the creation of safe communities, cultural and racial diversity, creative arts and encouraging excellence in civic design. A Vibrant Democracy includes civic engagement and the research and dissemination of information around critical community issues, designed to inform and shape public policy.

### GRANT APPLICATION PROCESS

Prior to submitting a full proposal, applicants are required to send a letter of inquiry that includes a brief statement about the organization, the proposed project, its intended results and a general idea of project costs. The applicant will receive an electronic notification that the letter of inquiry has been received and a grant identification number has been assigned.

Program staff will review each letter of inquiry; a process that could take six to eight weeks to complete. At that point, applicants will either receive an invitation to submit a full proposal or feedback regarding why the proposal could not be funded.

Additional information detailing the specific project goals and budget is required to be considered for a grant. The Common Grant Application (available on the Grantmakers of Western Pennsylvania website, [www.gwpa.org](http://www.gwpa.org) or on the Foundation's web site at [www.pittsburghfoundation.org](http://www.pittsburghfoundation.org)) provides guidelines for submitting a full proposal.

Generally, Program staff will request a meeting with the applicant and/or a site visit once the full proposal is submitted. The Board of Directors, which meets five times each year, makes final decisions on all grants.

### WHO CAN APPLY?

Grants are awarded to nonprofit organizations that are defined as tax exempt under Section 501(c)(3) of the Internal Revenue Code. In order to be eligible for a grant from unrestricted grantmaking, nonprofit organizations must be located within Allegheny County or demonstrate that the population served resides in Allegheny County. The Pittsburgh Foundation does not award grants from unrestricted grantmaking funds to individuals, nor does the Foundation generally award grants for annual operating costs, sectarian purposes, private or parochial schools, individual public schools, individual hospitals, organizations addressing the needs relating to single diseases, endowment campaigns, capital costs, special events, conferences, scholarships, internships or awards.

### LETTERS OF INQUIRY SHOULD BE SUBMITTED TO:

The Pittsburgh Foundation  
Attn: Program Department  
Five PPG Place, Suite 250  
Pittsburgh, PA 15222-5414

## FINANCIAL INFORMATION

### COMBINED STATEMENTS OF FINANCIAL POSITION

The Pittsburgh Foundation (and controlled supporting organizations)

As of December 31, 2013 and 2012

	2013	2012
<b>Assets</b>		
Cash and cash equivalents	\$79,236,594	\$86,706,451
Contributions receivable and other assets	148,846,578	87,714,487
Accounts and interest receivable	978,378	1,572,245
Investments	840,785,261	725,681,490
Program-related investments	764,590	852,065
Rental properties	347,305	347,305
Furniture, fixtures and equipment, net	2,212,497	2,272,599
<b>Total assets</b>	<b>\$1,073,171,203</b>	<b>\$905,146,642</b>
<b>Liabilities and Net Assets</b>		
Accounts payable and other liabilities	\$16,105,331	\$17,933,721
Grants payable	10,351,447	11,996,946
Accrued pension liability	3,180,982	5,186,538
<b>Total liabilities</b>	<b>29,637,760</b>	<b>35,117,205</b>
<b>Net assets</b>		
Unrestricted	133,235,490	129,789,835
Temporarily restricted	897,148,582	728,998,290
Permanently restricted	13,149,371	11,241,312
<b>Total net assets</b>	<b>1,043,533,443</b>	<b>870,029,437</b>
<b>Total liabilities and net assets</b>	<b>\$1,073,171,203</b>	<b>\$905,146,642</b>



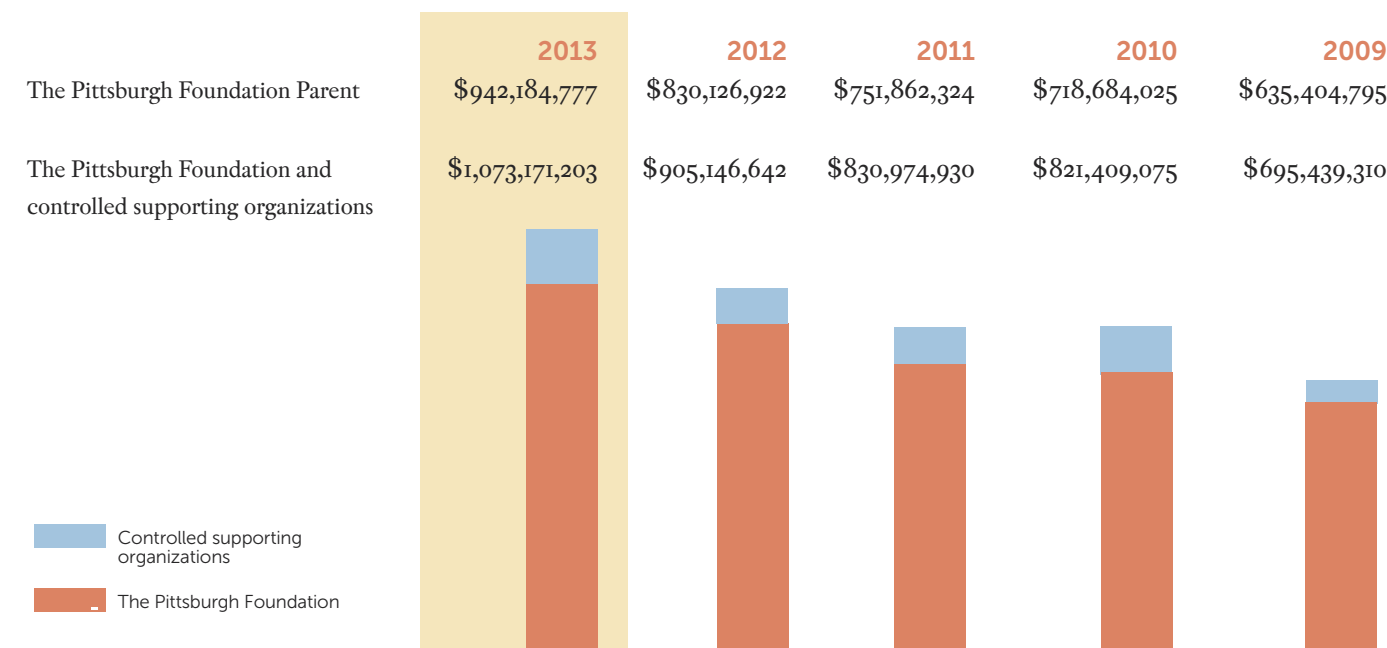


**COMBINED STATEMENTS OF ACTIVITIES**

The Pittsburgh Foundation (and controlled supporting organizations)  
For the years ended December 31, 2013 and 2012

	2013	2012
<b>Revenues</b>		
Contributions	\$123,388,782	\$60,169,229
Investment income, net	12,885,885	15,468,549
Net realized and unrealized gains (losses) on investments	89,883,245	53,440,057
Actuarial adjustments on split interest agreements	43,115	3,567,429
Other	296,821	812,964
<b>Total revenues</b>	<b>226,497,848</b>	<b>133,458,228</b>
<b>Expenses</b>		
Grants approved, net	42,569,107	43,550,025
Grantmaking and related services expenses	4,013,750	4,437,564
Development and donor services expenses	2,484,343	3,176,875
Management and general administrative expenses	2,378,008	2,873,418
Other	1,548,634	3,397,022
<b>Total expenses</b>	<b>52,993,842</b>	<b>57,434,904</b>
Increase in net assets	173,504,006	76,023,324
<b>Net assets at beginning of year</b>	<b>870,029,437</b>	<b>794,006,113</b>
<b>Net assets at end of year</b>	<b>\$1,043,533,443</b>	<b>\$870,029,437</b>

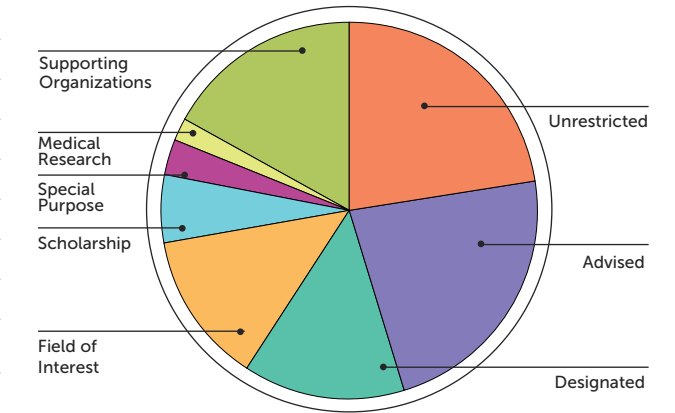
**GROWTH OF ASSETS OVER A FIVE-YEAR PERIOD**



**FUND ASSETS BY TYPE**

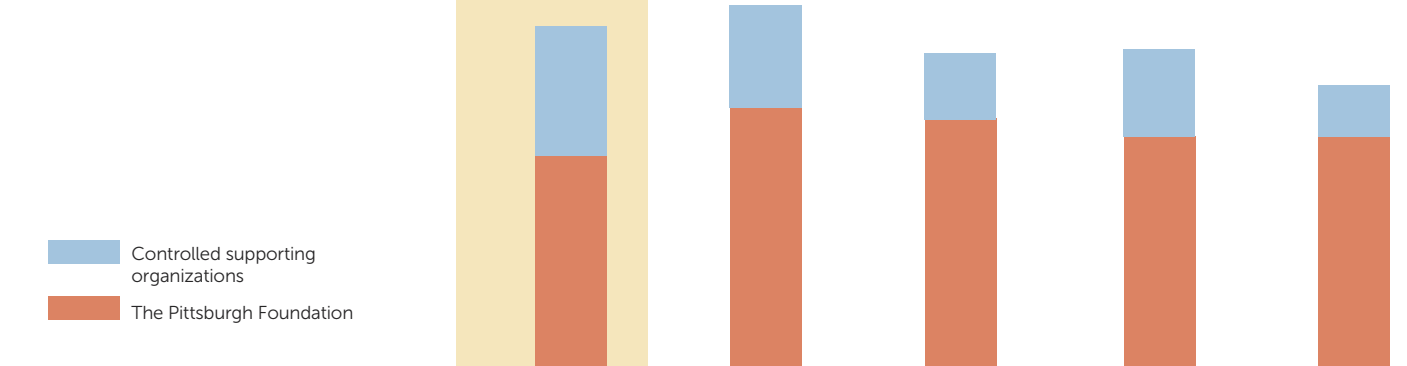
The Pittsburgh Foundation (and controlled supporting organizations)  
For the year ended December 31, 2013

Unrestricted	\$248,925,265
Advised	\$243,385,926
Designated	\$148,209,393
Field of Interest	\$134,379,221
Scholarship	\$60,110,046
Special Purpose	\$35,088,993
Medical Research	\$25,528,811
Controlled Supporting Organizations	\$177,543,548
<b>TOTAL</b>	<b>\$1,073,171,203</b>



**GRANTMAKING OVER A FIVE-YEAR PERIOD**

	2013	2012	2011	2010	2009
The Pittsburgh Foundation Parent	\$28,865,812	\$30,978,892	\$30,821,804	\$30,314,644	\$30,364,575
Controlled supporting organizations	\$13,703,295	\$12,571,133	\$10,251,731	\$11,485,481	\$6,561,953
<b>The Pittsburgh Foundation and controlled supporting organizations</b>	<b>\$42,569,107</b>	<b>\$43,550,025</b>	<b>\$41,073,535</b>	<b>\$41,800,125</b>	<b>\$36,926,528</b>



**SUMMARY OF GRANTS BY CATEGORY (PARENT ONLY)**

For the year ended December 31, 2013

Community Development and the Environment	\$4,051,870
Education	\$8,491,868
Art, Culture, Humanities	\$6,572,455
Health, Families, Youth and Special Needs Populations	\$8,281,702
Special Projects and Philanthropic Relations	\$1,467,917
<b>TOTAL</b>	<b>\$28,865,812</b>



## AFFILIATES

	The Community Foundation of Westmoreland County	Butler County Endowment Funds	Ligonier Valley Endowment Funds	Indiana County Endowment Funds	Cranberry Legacy Endowment Funds
Net Assets	\$20,512,409	\$5,525,889	\$4,083,597	\$1,302,072	\$648,615
Number of Funds	193	22	21	6	1
Gifts Received	\$1,733,196	—	\$43,472	\$1,500	\$55,000
Grants Approved	\$1,317,353	\$159,981	\$137,829	\$55,343	—
Contact Information	www.cfwestmoreland.org Jim Bendel, Executive Director jbendel@cfwestmoreland.org (724) 836-4400	www.endowmentforbutlercounty.org Leslie Osche bjb311@zbzoom.net	www.ligoniervalleyendowment.org John (Jack) McDowell nov550@aol.com (724) 238-3970	www.indianacountyendowment.org David Smith, President david.smith.gja5@statefarm.com (724) 254-1645	www.cranberrylegacyendowment.org Bruce Mazzoni brucemazzoni@zoominternet.net (724) 538-4555

## SUPPORTING ORGANIZATIONS

The Pittsburgh Foundation is affiliated with five supporting organizations in which it has control with total assets of \$177,543,548. The supporting organizations are separate entities that are exempt under section 501(c)(3) of the Internal Revenue Code of 1986. Each qualifies for the highest federal income tax deduction as a public charity because its charitable activities complement and further the charitable activities of The Pittsburgh Foundation. While they are separate entities, The Pittsburgh Foundation handles all administrative issues for the supporting organizations, relieving the donors of any administrative burden.

- A supporting organization at The Pittsburgh Foundation is designed for families and individuals who want to maintain independence in charitable giving, while benefiting from the Foundation's grantmaking and financial services expertise.
- Custom-tailored for endowments of approximately \$2 million or more, a supporting organization is a tax-exempt entity that offers you, as a philanthropist, the benefits of a private foundation, greater tax advantages available to a public charity, and the opportunity to engage in grantmaking decisions.
- Whether you choose to give locally or outside the region, the services provided by The Pittsburgh Foundation release you from the burdens of state and federal reporting, and the numerous and expensive administrative tasks associated with running a private foundation. And you and your family are able to remain involved in perpetuity.

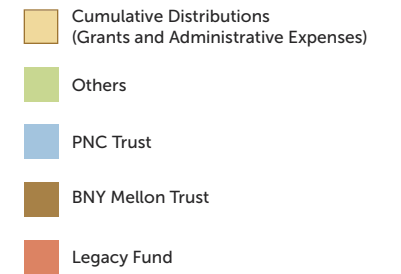
Further information is available at the Foundation's web site at [www.pittsburghfoundation.org](http://www.pittsburghfoundation.org).

- Select A Money Manager.**  
Your board can decide who shall invest and administer the assets.
- Pay Reasonable Administrative Fees.**  
Our team of professionals assumes the responsibility for all filing and compliance requirements.
- Establish Your Own Grants Budget.**  
You make charitable distributions as you see fit and are not limited to the foundation's grantmaking budget or spending policy.
- Identify Future Trustees.**  
You leave a charitable legacy and keep decision-making within your family or with close associates, in perpetuity.
- Avoid Excise Taxes And Annual Distribution Requirements.**  
You are not required to distribute a specified amount each year (as private foundations are), so you make only the gifts that you are inspired to make.
- Receive Assistance from the Foundation's Program Staff.**  
Our professionals can share their in-depth knowledge of community needs and, if you choose, help you decide where your charitable dollars go.
- Obtain Due Diligence Reports from Grantees.**  
Your gifts to 501 (c)(3) organizations will be monitored to ensure that your contributions are used according to your directives.

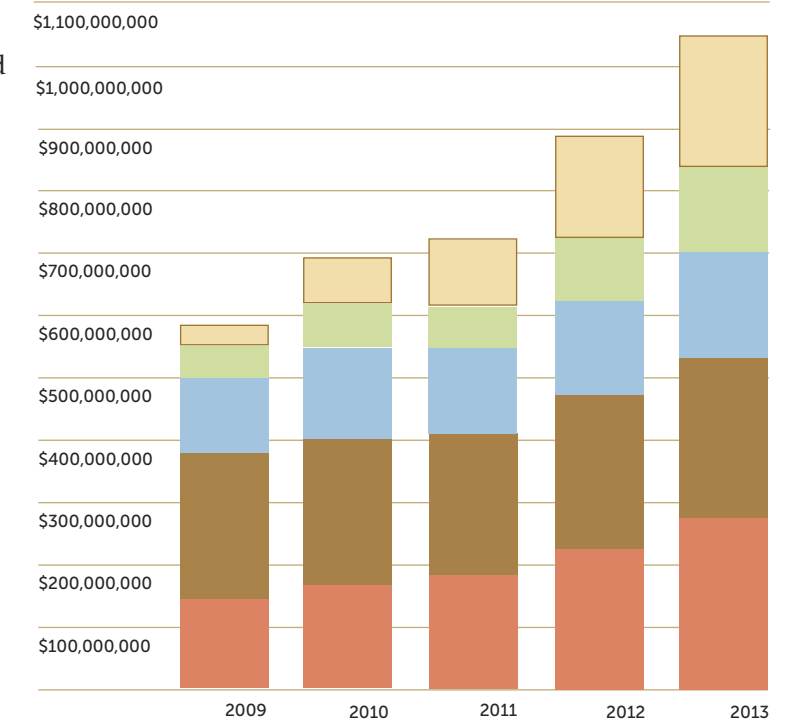
## INVESTMENTS

In 2009, the Legacy Fund was created to address the desire for greater investment flexibility on behalf of the Foundation, with the goal of improving the long-term, risk adjusted rate of return. The Legacy Fund has provided a true open architecture investment platform allowing the Foundation to access best of class investment managers in public and private markets. In addition to the Legacy Fund, the Foundation also added two additional investment portfolios that a fund could be invested in: The Intermediate Fund and The Grantmaking Fund, providing greater flexibility for charitable funds and the alignment of risk with the intended timing of the distribution of their grants.

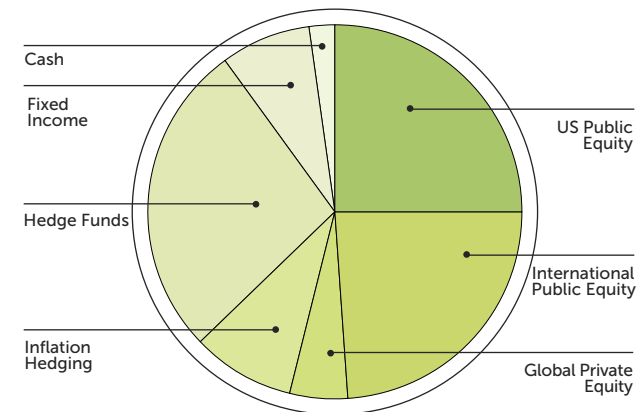
2013 was a great year for equity investors and the Legacy Fund's investments performed quite well during the year, outstripping our primary target of our 5% spending policy plus inflation. Growth in the fund, although assisted by another good fundraising year, was primarily driven by our ongoing equity bias and its positive impact. The fund has remained underweight fixed income, searching for safety in hedged equity and credit funds, while seeking diversifying returns in a private equity portfolio that continues to be built on appropriate opportunistic investments. Although real assets created some headwinds during the year, we have retained our investments in this area in anticipation of the eventual return of inflation.



INVESTED ASSETS



LEGACY FUND ASSET ALLOCATION



ANNUALIZED RETURNS (%)

	1 Year	2 Years	3 Years	5 Years	10 Years
Total Managed Assets	14.83	12.42	7.70	11.23	5.77
80% MSCI All-Cap World Index/ 20% Barclay's Capital Aggregate Index	18.93	16.59	8.98	13.87	7.41
CPI + 5%	6.50	6.62	7.07	7.08	7.37
<b>Legacy Fund</b>	<b>13.80</b>	<b>12.29</b>	<b>6.50</b>	<b>n/a</b>	<b>n/a</b>
Intermediate Fund	1.50	5.42	4.60	n/a	n/a
Grantmaking Fund	0.10	0.10	0.10	n/a	n/a



## BOARD OF DIRECTORS

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



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William E. Hunt



Anne Lewis



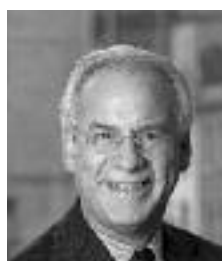
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David J. Malone



David McL. Hillman



Vincent J. Quatrini, Jr.  
Also serves on  
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of Westmoreland  
County Advisory Board



James Roddey



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Walter H. Smith, Jr., Ph.D



William E. Strickland

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Biographies of all Board members and Directors Emeriti are available on the Foundation's website at: [http://pittsburghfoundation.org/board\\_aboutus](http://pittsburghfoundation.org/board_aboutus)



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Vice President for  
Public Policy and  
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\* Until June 2014

\*\* Serving as Interim President  
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Assistant Director of  
Donor Services and  
Planned Giving

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Officer

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Data Analyst/  
Administrative Assistant

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Director of Donor  
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**Trista Yerks**  
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