

FORUM



Maxwell King, president and CEO, instigates a selfie to celebrate September's successful Day of Giving reboot with The Pittsburgh Foundation's staff. See Page 8 for more.

Please do not hesitate to contact The Pittsburgh Foundation if you are interested in establishing a new fund. The Foundation's office is open through Dec. 30, and funds can be set up in 24 hours or less.

For current donors, please contact your donor services representative prior to making a gift. Please refer to the following dates for year-end giving to your fund:

Mutual funds must be initiated by Wednesday, Nov. 30.

Stock/cash transfers must be received in the Foundation's account by Friday, Dec. 30, at 5 p.m. Please make the Foundation aware of your stock gift ahead of the transfer.

Checks must be postmarked by Saturday, Dec. 31.

The Foundation's office will be closed on Friday, Dec. 23, and Monday, Dec. 26.

The office will be open until 3 p.m. on Friday, Dec. 30.

NEW FUNDS August 1, 2016 – October 1, 2016

100 Percent Pittsburgh Youth
Voices Initiative
DeSean Fountain Memorial Fund
Jason and Lauren Julius Charitable Fund
Lessig-Spangler Fund
Meghan Klingenberg Foundation Fund
Richard H. Kerlin Memorial Fund
Shawn Collingwood Memorial
Scholarship Fund
Vee Jay Cochran Memorial
Scholarship Fund
Ligonier Valley Endowment/Regis and
Diane Synan Fund

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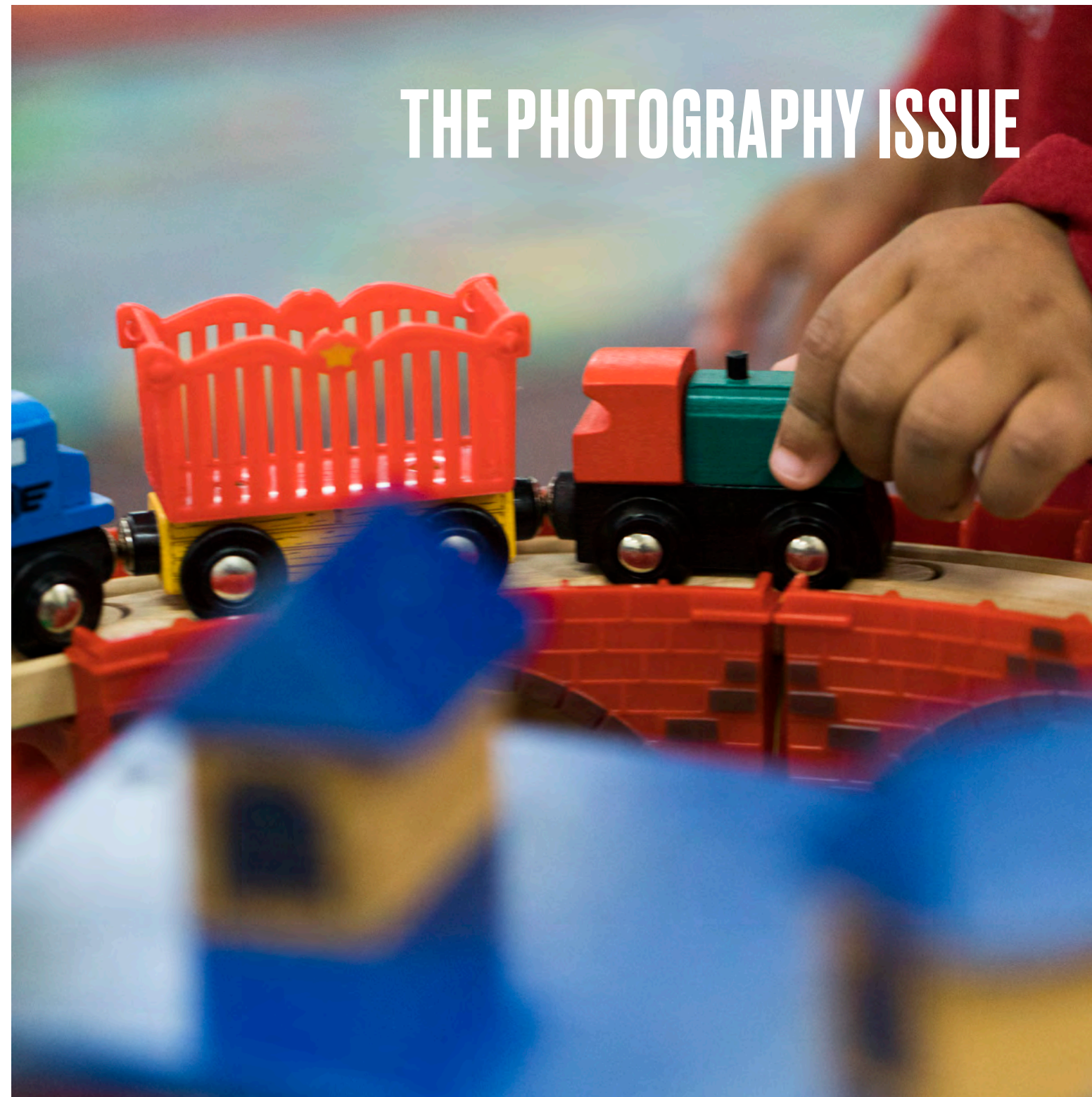
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ON THE COVER
A child pushes a toy train at Jeremiah's Place, the Pittsburgh region's only emergency nursery. The nonprofit serves families in crisis, many of whom face problems that The Pittsburgh Foundation's new organizing principle, 100 Percent Pittsburgh, is designed to address. See Page 4 for more.

PRESIDENT'S MESSAGE

IN THE 71 YEARS that The Pittsburgh Foundation has been pursuing its mission to improve life prospects for all residents in the region, the strategies driving its philanthropy have changed dramatically.

So, too, have the strategies for explaining and promoting the work.

Early on, the acts of charitable giving that came out of the Foundation's individual funds were considered to be private. Many thought it unseemly to use personal stories to explain their philanthropy and account for its effect on the community. But as the Foundation's resources have grown and the community's needs have broadened, we all now realize that storytelling is essential to our future success. We must tell stories that attract people to our work, reinforce our commitment to transparency and act as measures of what we do.

This issue of FORUM celebrates visual storytelling — primarily photography and the various devices and platforms that move it along to audiences. From selfies to mark the successful makeover of our Day of Giving program to images that portray life at Jeremiah's Place, Pittsburgh's only emergency safe haven for children dealing with abuse, neglect or homelessness, the visual is vital.

It amazes me that in an era of near-daily technological advances in communications, the simple photographic image continues to hold such impressive storytelling power. And for that reason, you will see much more of it in our publications and on our website as we go forward.

Maxwell King | president & CEO



IMAGINE YOURSELF, frightened and alone, fleeing a violent situation at home. Now imagine that same scenario, but this time you're on the run with your 3-year-old. You head for Jeremiah's Place because you know you can trust the people there to care for your toddler with the same compassion they have for the 400 children the center has welcomed since its opening in 2014. The only crisis nursery in the region, Jeremiah's Place has provided free, safe emergency child care to 250 families. Children stay for up to 72 hours at a time, sheltered from the stress of family crises and surrounded by caregivers who provide creative play, comfort and a sense of normalcy. Children leave Jeremiah's Place with a backpack full of items that they may have lost in the rush out of home: a stuffed animal, a blanket, a toothbrush, toothpaste, a new pair of pajamas.

The families at Jeremiah's Place come from 56 ZIP codes, but nearly all of them — 98 percent — come from households headed by low-income single women with children. They contend with challenges that extend far beyond emergency child care: food insecurity, unemployment, intimate partner violence and mental health. A 2014 Urban Institute study funded by the Foundation found that single women with children face the greatest risk of poverty in our region.

The Foundation's newly established 100 Percent Pittsburgh organizing principle is working to address this vulnerability. A \$43,000 grant is deepening the nonprofit's collaboration with Jewish Family & Children's Service to provide women with the services they need to transition to stability: therapy sessions, employment counseling, transportation subsidies, companionship and support from other families in crisis.

100 PERCENT PITTSBURGH JEREMIAH'S PLACE





STAFF
PROFILE

INVESTING IN THE FOUNDATION

JAY DONATO, The Pittsburgh Foundation's investment manager, is no stranger to big challenges. Before joining the Foundation in April of last year to manage the third-party investment program, he worked for small investment advisory firms in Pittsburgh and California, where he once swam from Alcatraz to the mainland as an open-water swimmer in San Francisco.

Likewise, **COLLEEN COLLINS** is another experienced West Coast transplant. One of the newest members of the Foundation team, Collins joined the staff as investment analyst in June after nine years as a consulting analyst in Seattle. So far, she says, she's been particularly impressed by Pittsburgh's commitment to its nonprofits.

They have focused this year on implementing a new investment-management tool called the Black Diamond Wealth Platform. The software will automate data entry from the Foundation's different accounts, increasing efficiency and helping the Finance and Investments teams manage the Foundation's funds with more precision. It's an exciting transition, Donato says — one that's poised to “really expand the reach of The Pittsburgh Foundation's philanthropy.”

A SMART (PHONE) SOLUTION TO A BIG PROBLEM

ON ANY GIVEN NIGHT in Allegheny County, about 1,000 people face homelessness or housing insecurity. Many find refuge where they can, from cold alleyways to makeshift camps beneath bridges.

“Let's say a police officer is out there on the street and runs into someone who needs help — what does he or she do?” asks Foundation donor Terry Serafini. For years, there was no reliable answer.

Jennie Zioncheck, the Foundation's director of development, connected him to Dr. Joseph Lagana, founder of the Homeless Children's Education Fund, who pitched Serafini on a smartphone-friendly website that could immediately connect someone facing a housing crisis to needed services. For Serafini, who went to college to become a teacher but ended up in a career in technology instead, the opportunity was a philanthropic fit.

Launched in August with support from Serafini and others, BigBurgh.com has already been used thousands of times by police officers, concerned citizens and people facing homelessness themselves. “We're very excited about [BigBurgh],” says Serafini, pictured here at a homeless encampment beneath the 31st Street Bridge. “It could save someone's life, and we're determined to keep it going.”



DAY OF GIVING REDUX

GENEROSITY GOES VIRAL

KELLY URANKER, director of the Foundation's Center for Philanthropy, allows herself a public display of triumph as she checks the list of fundraising incentive prizes in the first few hours of the Sept. 21 Day of Giving. It was billed as a recovery effort from a previous attempt in May — one that was upended due to technical failures in the systems of the online crowdfunding firm contracted to run Pittsburgh's event and scores of others across the country that day.

Uranker, who manages the Day of Giving program, had good reason to give a thumbs-up: more than 15,700 people made contributions during the makeup day, bringing the official total for the two events this year to nearly \$6 million raised for nonprofits in Allegheny, Westmoreland and Butler counties. Just as important as the dollars raised is the energizing effect that the events have on the generosity of donors, nonprofits and the public. Since the first event in 2009, the program has raised more than \$43 million.

The lure of matching funds was a significant draw in the early years of the event, but as it grew in popularity, demand quickly outpaced the ability of the Foundation to offer meaningful match pools. In 2013, the Foundation began focusing on helping nonprofits build their own fundraising ability. For Allegheny County nonprofit staffs this year, the Foundation provided training and support services along with incentive prize funds to enable them to raise their own matching pools to attract donors. The capacity-building strategy worked far better than expected: Allegheny County nonprofits self-reported raising \$2.35 million in matching funds this year, far exceeding the \$750,000 total match that the Foundation provided in 2013 and 2014.





ADVISOR
PROFILE

SEMPER FIDELIS

WHETHER IT'S HIS COUNTRY or his clients, **DAN HENDERSON** — president and CEO of Cookson, Peirce & Co., Inc. — knows what it means to serve. An active Marine from 1988 to 1992, the financial advisor now chairs the annual Steel City Awards Dinner of the Marine Corps Scholarship Foundation, a fundraiser that brings together Pittsburgh's Marine community to celebrate local families. At September's dinner at the Fairmont Pittsburgh, Henderson (right) — who regularly refers charitably inclined clients to The Pittsburgh Foundation — speaks with Foundation Board member and former Marine Corps Capt. James Roddey. What's the best part of chairing a dinner that fundraises for the Marine Corps Scholarship Foundation, the nation's oldest and largest provider of need-based scholarships to military children? That's easy, Henderson says: "Honoring the Marines who served with me by helping with their children's education."

MOVEMENT AND GRACE AT THE AUGUST WILSON CENTER

ON THE SUNNY SECOND FLOOR of downtown's August Wilson Center, nearly 75 dancers practice their technique. Instructor Greer Reed's nonprofit dance company, Reed Dance, received one of six inaugural grants from the Foundation's Programming Fund for the Wilson Center. It was launched in 2015 to support independent productions at the rejuvenated arts and cultural space. Grant recipients were chosen by a five-person panel of regionally and nationally acclaimed professional artists. Reed Dance, an organization that preserves the African American experience through dance, used its \$60,000 grant to support a two-week summer dance intensive at the Center in August.



THE PLACARDS TELL THE STORY: The stall in the passage of Pennsylvania's budget was in its 267th day when Westmoreland County's Board of Commissioners, human services providers, and civic and religious leaders rallied at Courthouse Square in Greensburg to draw public attention to the funding cutoff for thousands of nonprofits that deliver essential human services. Staff of

The Pittsburgh Foundation; its affiliate, The Community Foundation of Westmoreland County; and the Greater Pittsburgh Nonprofit Partnership (GPNP) went into action developing a social media campaign to drive news and comments from the protest event to other audiences across the region and the state. More than a dozen leaders spoke at the rally, including Bobbi Watt

Geer, regional vice president of the United Way of Southwestern Pennsylvania, who also represented GPNP, the advocacy arm of The Forbes Funds.

The rally was one of the first public protests organized to pressure lawmakers to finalize a state budget. Ensuing protests in Pittsburgh, Harrisburg and Philadelphia helped to push lawmakers and the governor to pass a budget in March, a total of

nine months beyond the June 30, 2015, deadline. Many human services providers suffered staff disruptions and were forced to pay costs connected to loans to continue operations. The Foundation and its partners have committed to monitoring the coming year's budget process and will continue to organize and advocate for more responsible governing and protection of vital services.

CRANKING UP THE VOLUME ON ADVOCACY





Mayor Richard Caliguiri (front and center in sweatshirt) at the inaugural Great Race.



RACING AGAINST AMYLOIDOSIS AND HEART DISEASE

When the first running of the Great Race was held in 1977, Mayor Richard Caliguiri was at the front of the pack in a goldenrod-yellow sweatshirt, leading as he always did: by example. When he died in office at age 56, in 1988, from amyloidosis — then considered a rare form of heart failure — the city was devastated. A Pittsburgh Foundation fund was established in his memory to study the disease. One dollar from every Great Race registration since 1993 has gone into the Richard S. Caliguiri Fund, raising \$250,000. Now, scientists have come to believe that one in four people in the United States who die of heart disease may have undiagnosed amyloidosis.

On Oct. 5, The Pittsburgh Foundation's Center for Philanthropy announced a new \$2 million co-creation initiative to create an endowed research chair at the University of Pittsburgh School of Medicine. Beginning early next year, Dr. Mark Gladwin, chair of the University of Pittsburgh's Department of Medicine, will lead a national search for a world-class scientific researcher who specializes in amyloidosis and heart disease. The research chair will be housed at the school's Heart, Lung, Blood and Vascular Medicine Institute, where a clinical center is set to open soon.



Change Agents in Education

Developed as a co-creation partnership between The Pittsburgh Foundation's Center for Philanthropy and donors Joe and Sue Ballay, the Change Agents in Education program provides training in Human-Centered Design as a way to spur innovation and change in the region's public schools. Since its creation in 2012, more than 75 educators have

completed the program, taking their new skills back to their schools and working with colleagues, students, parents and community members to transform education in our region.

In November, the Foundation will offer its first Change Agents seminar for students. The program, Students Working for Social Justice, seeks to generate youth-designed and youth-led projects that will improve participants' schools and communities. Two dozen highly motivated high school juniors and seniors, each nominated by adult allies in their schools, will work with their peers from around the region to learn new problem-solving skills, to think critically about issues facing their schools and communities, and to ultimately apply for grants to carry out the rigorously designed, collaborative projects that they will create. Learn more at pittsburghfoundation.org/changeagents



A Walk in the Woods

Led by tour guides from the Pittsburgh Parks Conservancy, 100 donors attended The Pittsburgh Foundation's Fall Donor Appreciation Event. They were treated to a guided hike through Frick Park and private tours of the newly opened Frick Environmental Center (pictured left). Built to connect people of all ages and backgrounds to the beauty of Pittsburgh's ecosystem, the Center is one of only 11 buildings worldwide to pass the Living Building Challenge, which has the world's most rigorous set of sustainability standards. After getting a behind-the-scenes look at the Center's cutting-edge technology, donors attended a reception with live music, catered hors d'oeuvres and remarks by Camila Rivera-Tinsley, the Conservancy's director of education.



A Gift that Keeps on Giving

The Pittsburgh Foundation's Charitable Gift Cards make inspiring, convenient gifts that also support the region's nonprofits. Available in increments of \$25, \$50 and \$100, the cards are ideal for family members, friends and business associates.

Cards may be redeemed with the Foundation, which will direct the funds to a charity (or charities) of the cardholder's choosing, or they may be presented directly to any nonprofit in western Pennsylvania. Each card is valid for one year, after which any unredeemed funds are used as part of the Foundation's community grantmaking initiatives.

Purchase gift cards at givingcard.pittsburghgives.org. Gift card purchases are tax-deductible and come with automatic acknowledgment forms for tax purposes.

If you are interested in purchasing a Charitable Gift Card from The Pittsburgh Foundation, please note the following deadlines:

Delivery: To ensure delivery by Dec. 25, online and mail orders must be received no later than Dec. 9 at noon (per U.S. Postal Service recommendation).

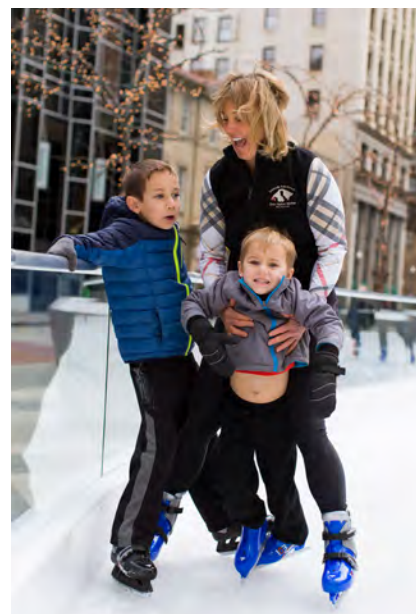
Holiday In-Person Pickup: Orders must be received by Dec. 16 at noon for pickup at the Foundation's office through Dec. 22 at noon.

Year-End Pickup: Orders must be received by Dec. 21 at noon for pickup at the Foundation's office the week of Dec. 27-30 (before 3 p.m.).

SMALL AND MIGHTY

Though small nonprofits account for two-thirds of the region's nonprofit sector and often serve our community's most vulnerable populations and neighborhoods, many are consistently asked to do more with less. To that end, Michelle McMurray, The Pittsburgh Foundation's senior program officer for Health and Human Services, launched the Small and Mighty grants program this fall. Designed with assistance from her colleagues and input from small nonprofits themselves, the program intends to bridge the gap between the Foundation's grantmaking and small, neighborhood-based nonprofits that work to better our region. The program offers a streamlined grant-seeking process for organizations with annual budgets of less than \$600,000. "Small and Mighty is our intentional effort to build relationships with these vital safety-net organizations through a more accessible and transparent grant-seeking process," McMurray says. She is shown at right introducing the program to dozens of nonprofit leaders during a community information session at the Carnegie Library of Pittsburgh's East Liberty branch.

To learn more, visit pittsburghfoundation.org/smallandmighty



A Holiday in the Plaza

The Pittsburgh Foundation invites donors, professional advisors and their families to celebrate the holidays in Pittsburgh Foundation style. Join us Friday, Nov. 25, for our 15th annual family ice skating event, featuring complimentary skate rentals, snacks and refreshments for you and up to six guests. Register online at community.pittsburghfoundation.org/skate2016



Coming Soon: 2016 Wish Book

The 2016 edition of the Wish Book will arrive in donors' mailboxes just before Thanksgiving. Featuring 73 wishes, the Wish Book provides opportunities to meet the needs of nonprofit organizations for \$2,500 or less.

"Though the requests are modest, fulfilling them brings outsized benefits to the nonprofits and the people they serve," says Yvonne Maher, senior vice president for Development and Donor Services. Last year, for example, Prevention Point Pittsburgh, a nonprofit that provides health empowerment services to injection drug users, requested and received funds for 70 naloxone kits. These powerful kits (pictured left) can reverse opioid overdoses and save lives.

Other wishes range from more of the practical (such as washers and dryers for people transitioning from homelessness to permanent housing) to the personal (holiday gifts for adolescents with mental health needs). Any public nonprofit organization in western Pennsylvania can submit wishes, which are reviewed by a committee of the Foundation's donors. Since its debut in 2004, the Wish Book has raised more than \$1 million for the region's nonprofits.



Giving Thanks to Advisors

Behind many donors' decisions to establish a fund is a professional advisor who has recommended The Pittsburgh Foundation as a way to achieve charitable goals and tax benefits. Kate McKenzie, senior development officer (above, left), and Jennie Zioncheck, director of development, appreciate the confidence that advisors place in the Foundation.

"We recognize how hard advisors work to earn the trust of their clients," says Zioncheck. "We do everything in our power, especially at year-end when deadlines are so critical, to provide concierge-level service." For McKenzie, working so closely with advisors "allows us to deepen relationships with donor families across generations." See the back cover of FORUM for year-end giving deadlines.



For Professional Advisors: The Pittsburgh Foundation's Fall Continuing Learning Event

The Pittsburgh Foundation and BNY Mellon Wealth Management welcomed Robert K. Kirkland, president of the law firm of Kirkland Woods & Martinsen PC in Kansas and Missouri, to the Duquesne Club's main dining room Nov. 16. Kirkland's lecture focused on recent

developments in estate planning for retirement benefits, including recent rulings and cases that deal with designating trusts as beneficiaries of retirement plans. He also discussed creditor access to inherited IRAs, same-sex marriages, spousal rollover issues, charitable planning with IRAs and potential legislative developments. The presentation included a discussion of ethical issues that arise in everyday trusts and estates practice.

This event was approved for two CLE credits (one substantive, one ethics), two CFP credits and two CPE credits.

NEW INSTRUCTIONS FOR STOCK TRANSFERS, MUTUAL FUND DONATIONS AND CASH WIRES

AS WE HEAD INTO WINTER, please note an important change at The Pittsburgh Foundation. In order to increase efficiency and streamline stock transfers, mutual fund donations and cash wires for donors invested in Legacy Funds and/or American Funds, we have created a new account to receive gifts.

As a result, the instructions for adding to a fund at the Foundation also have changed. In order to prevent future gifts from being rejected, please contact the Foundation's Development and Donor Services Department at 412-394-4294 prior to transferring any assets.

Listed here are instructions for delivering securities, stock and/or cash into the Foundation's new gift account. These should be used from this point forward, rather than the previous year's instructions, which called for transferring gifts to Morgan Stanley or the BNY Mellon account.

Please don't hesitate to contact a donor services representative with any questions or concerns. Please also note that the procedure for checks and credit card gifts remains the same.

DONORS:

To wire stock/DTF eligible securities:

Contact a donor services representative.
DTC# 0443
Account Name: Pershing LLC
For Credit to Account Number: N7M001723
Client Account Name: The Pittsburgh Foundation
Year-end deadline: Friday, Dec. 30 at 5 p.m.

To wire cash:

Contact a donor services representative.
ABA 021000018
Account Name: Pershing LLC
Account Number: 890-051238-5
For Further Credit: N7M001723
The Pittsburgh Foundation
Year-end deadline: Friday, Dec. 30 at 5 p.m.

For mutual funds and other securities:

Contact a donor services representative.

Year-end gifts must be initiated by Nov. 28.