

## The Rapides Foundation

Last Updated: 2013-01-25

### At A Glance

1101 4th St., Ste. 300  
Alexandria, LA United States 71301-8311  
Telephone: (318) 443-3394  
Fax: (318) 443-8312  
E-mail: [info@rapidesfoundation.org](mailto:info@rapidesfoundation.org)  
URL: [www.rapidesfoundation.org](http://www.rapidesfoundation.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Health conversion foundation
- Hospital or a cooperative hospital service organization

### Financial Data

(yr. ended 2011-12-31)  
Assets: \$215,889,564  
Total giving: \$5,362,337

### EIN

720423603

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Toll-free tel.: (800) 994-3394

### Background

Established in 1924 in LA; converted from the sale of Rapides Regional Medical Center to Central Louisiana Healthcare Systems Partnership.

### Limitations

Giving limited to Allen, Avoyelles, Catahoula, Grant, La Salle, Natchitoches, Rapides, Vernon, and Winn parishes, LA.

No support for private foundations, disease-specific organizations seeking support for national projects or programs, or hospitals.

No grants to individuals, or for conferences or symposia established prior to 1995, fundraising, telethons, operating expenses which are not used to significantly expand the services of organizations currently in operation, renovation, or building or equipment purchases (not explicitly linked to enhanced programmatic implementation or development)

### Purpose and Activities

The foundation aims to improve community health and brighten the future through building capacity to resolve local challenges in central Louisiana.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Diet and Physical Activity Grants

Grants of up to \$25,000 each will be awarded for projects that encourage and improve physical activity and healthy eating among residents in nine Central Louisiana parishes: Allen, Avoyelles, Catahoula, Grant, LaSalle, Natchitoches, Rapides, Vernon, and Winn. Nonprofits, government entities, and faith-based community groups may apply. Funds must be used to create, improve or repair physical-activity settings, such as walking trails, playgrounds or exercise stations, or for healthy food settings, such as farmers markets or community gardens.

#### Mini Opportunity Grants

These grants are intended to support projects of one year or less that fall under the foundation's priority areas with grants of up to \$10,000. Eligible requests include pilot programs or technical assistance for projects designed to test out an idea or specific time-limited projects that advance an organization's programs in some definable manner.

## **Program Opportunity Grants**

These grants are intended to support large-scale projects or programs that fall within one of the foundation's priority areas: healthy people (promoting healthy behaviors and improving access to healthcare), education (increasing the level of educational attainment and achievement as the primary path to improved economic, social, and health status), and healthy communities (improving economic opportunity and family income, and enhancing civic and community opportunities for more effective leaders and organizations). Unsolicited requests for funding are not accepted under this program.

## **Technical Assistance Grants**

These grants are limited to one-time only allocations of up to \$10,000 over a one-year period. Grants are made in an effort to respond to qualified organizations that recognize the need for project planning, research, and organizational development, in fields defined by the foundation (healthy people, education, and healthy communities)

## **Fields of Interest**

### **Subjects**

- Arts
- Children/youth, services
- Community/economic development
- Economic development
- Elementary/secondary education
- Health care
- Human services

## **Geographic Focus**

- Louisiana

## **Types of Support**

- Consulting services
- Curriculum development
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Grants list
- Informational brochure (including application guidelines)
- Newsletter
- Occasional report
- Program policy statement

## **Application Information**

The fund will respond to letters of inquiry; only those accepted will be invited to submit a full proposal. Eligible organizations must have 501(c)(3) nonprofit status. See web site for additional information.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Results expected from proposed grant
4. Statement of problem project will address
5. Copy of IRS Determination Letter
6. Brief history of organization and description of its mission
7. Copy of most recent annual report/audited financial statement/990
8. How project's results will be evaluated or measured
9. Listing of board of directors, trustees, officers and other key people and their affiliations
10. Copy of current year's organizational budget and/or project budget
11. Additional materials/documentation

Initial approach: Letter, telephone or e-mail

Copies of proposal: 5

Board meeting date(s): Quarterly

Deadline(s): May 15 and Oct. 15 for Program Opportunity Grants; Apr. 2 for Diet and Physical Activity Grants; none for Mini Opportunity Grants

Final notification: 90 days after deadline for proposal; 60 days after application for Mini Opportunity Grants

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Regionald Seastrunk \*, Chair.  
Affiliation(s):  
*Equal Employment Opportunity, Member*
- Kathleen Nolen \*, Vice-Chair.  
Affiliation(s):  
*Cleco, Treas.*
- Joseph R. Rosier, Jr. \*, Pres. and C.E.O.
- Renick Webb, M.D. \*, Secy.
- J. Lynn Bordelson \*, Treas.  
Affiliation(s):  
*Hibernia National Bank, V.P., Business Banker*
- Rev. Doyle L. Bailey
- Michael G. Buck, M.D.
- Jacque Caplan
- Blake Chatelain  
Affiliation(s):  
*Red River Bank, Pres. and C.E.O.*
- Ilyas Chaudhry, M.D.
- Kelvin Freeman  
Affiliation(s):  
*Union Tank, Engineer*
- Donald Kramer
- Albin M. Lemoine, Jr.
- Donald Mallet  
Affiliation(s):  
*Civilian Personnel Advisory Center, Fort Polk, Dir.*
- Mike Newton  
Affiliation(s):  
*Colfax Bank, Pres.*
- Kathleen Nolen  
Affiliation(s):  
*Cleco Corporation, C.F.O.*
- Maxine Pickens  
Affiliation(s):  
*Bureau of Health Standards, Medical Certification Regional Mgr.*
- Caroline Theus  
Affiliation(s):  
*Keller Enterprises, Pres.*
- Melanie Torbett

## Memberships

### Regional Associations of Grantmakers

- Southeastern Council of Foundations

### Affinity Groups

- Grantmakers for Education
- Grantmakers for Effective Organizations
- Grantmakers In Health

### Associations and Other Philanthropic Organizations

- Louisiana Association of Nonprofit Organizations

## Financial Data

Year ended 2011-12-31

Assets: \$215,889,564 (market value)

Expenditures: \$64,230,807

Total giving: \$5,362,337  
Qualifying distributions: N/A  
Giving activities include:  
\$5,362,337 for grants

## Online Communications

- [Pinterest](#)
- [Twitter](#)
- [Facebook](#)
- [YouTube](#)

## Additional Location Information

County: Rapides  
Metropolitan area: Alexandria, LA  
Congressional district: Louisiana District 05

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## Walter and Elise Haas Fund

**Last Updated:** 2014-08-21

### At A Glance

1 Lombard St., Ste. 305  
San Francisco, CA United States 94111-1130  
Telephone: (415) 398-4474  
Contact: Pamela H. David, Exec. Dir.  
URL: [www.haassr.org](http://www.haassr.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$215,734,747  
Total giving: \$11,426,402

### EIN

946068564

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Incorporated in 1952 in CA.

Mr. Haas, who died in 1979, was president of Levi Strauss & Co., manufacturers of men's, boys', women's, misses', and children's apparel. Mrs. Haas served as vice-president of the fund until her death in 1990. The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

### Limitations

Giving primarily in San Francisco and Alameda County, CA.

No grants to individuals, or for general fundraising, endowment campaigns, scholarships, fellowships, or for video or film production (except through the Creative Work Fund)

### Purpose and Activities

The mission of the fund is to help build a healthy, just, and vibrant society in which people feel connected to and responsible for their community. The areas of focus are the arts and culture, economic security, Jewish life, and public education. In addition, continuing support is provided to organizations that have long established ties to the fund.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

### **Arts and Culture**

The purpose of this area is to enable Bay Area residents to realize the full potential of the arts to build cross-cultural understanding and enrich individual lives. The four goals are: 1) Arts Education: To increase creative opportunities for children and youth who otherwise have limited access to studying the arts or to interacting with working artists; 2) Preservation of Cultural Heritage: To strengthen nonprofit organizations dedicated to the preservation of cultural heritage, particularly those that are based within and dedicated to sustaining arts traditions in recent immigrant communities; 3) Cultural Commons: Fostering shared understanding and a stronger sense of community through participation in the arts; and 4) via The Creative Work Fund: to foster partnerships between artists and nonprofit organizations to create new work and engage the public in new ways.

### **Economic Security**

The purpose of this area is to help low-income adults and families achieve upward mobility and economic security. It supports programs that address these issues through direct services, public policy reform, and field building. The four goals are: 1) Workforce Development: To help low-income people gain the skills and access necessary to secure quality employment and achieve upward mobility; 2) Build and Protect Assets: To help low-income individuals and families gain and maintain the financial assets that increase economic security and upward mobility; and 3) Public Policy and Systems Change: To encourage changes in public policy, regulatory reform, and the delivery of services to low- and moderate-income people with the goal of increasing opportunities and removing barriers to economic security.

### **Employee Matching Gifts**

The foundation matches the monetary gifts of its officers, trustees, and staff to charitable organizations.

### **Jewish Life**

The purpose of this area is to foster a vibrant, inclusive Jewish community in the Bay Area, that offers opportunities for engagement in Jewish life and that encourages participation in the broader pluralistic society. The two goals are: 1) Promote Diversity: Build a strong and vibrant Jewish community able to harness the strength that results from a diverse population; and 2) Building Partnerships For Social Justice: Create effective partnerships based on shared values such as fairness, equality, and service.

### **Legacy Grantmaking**

This program is designed to fund grants in fields important to the foundation's founders. Of particular note are the following programs: 1) San Francisco Parks: A small percentage of the grantmaking budget is allocated to exceptional community engagement initiatives that support and improve San Francisco's parks and open spaces (letters of inquiry are accepted); 2) Annual Grants: A limited number of grants will be provided to organizations supported by the donors in their lifetimes; 3) Jewish Community Federation: The foundation makes a significant contribution to the federation's annual campaign as a complement to the foundation's own Jewish Life program; 4) Descendent Grants: a small percentage of the foundation's grantmaking is reserved for descendent-initiated grants; 5) End-of-year Grant: The foundation makes a number of small grants to organizations that serve very low-income families and individuals; most of these grants are designed to address some of the special needs that arise during the holiday season.

### **Mission-Related Special Grantmaking**

In keeping with its mission and values, the foundation will continue to be an active participant in its geographic, philanthropic and nonprofit communities. Most of their active engagement will be in one of the primary program areas. However, the foundation recognizes that there may be a relatively small number of special projects consistent with the foundation's mission, values and overall strategy that they would like to participate in. Such projects might involve advancing the effectiveness and accountability of philanthropy, for example, or be in response to extraordinary opportunities or crises facing critical community institutions and organizations.

### **Public Education**

The purpose of this area is to improve the quality of public education by building effective school communities. The fund gives priority to programs that focus on increasing educational opportunities for underserved students. The three goals are: 1) School Leadership: To help principals and teachers in leadership positions improve practices in schools that result in academic gains for all students; 2) Teacher Quality: To help teachers improve instructional skills to engage students in rigorous, academic pursuits; and 3) Partnerships for School Improvement: To engage parents, youth, and the broader community in activities to improve the quality of education in public schools. The activities may be led by organizations external to the school system or be initiated within the public schools.

### **The Creative Work Fund**

The fund invites artists and nonprofit organizations to create new art works through collaborations. It celebrates the role of artists as problem solvers and the making of art as a profound contribution to intellectual inquiry and to the strengthening of communities. Artists are encouraged to collaborate with nonprofit organizations of all kinds. Grants will be awarded to collaborating 501 (c) (3) nonprofit organizations, not directly to collaborating artists. For more information see: <http://creativeworkfund.org/index.html>.

## **Fields of Interest**

### **Subjects**

- Arts
- Arts education

- Economic development
- Education
- Jewish agencies & synagogues

## Geographic Focus

- California

## Types of Support

- Building/renovation
- Capital campaigns
- Continuing support
- Employee matching gifts
- Equipment
- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Program-related investments/loans
- Research
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Grants list
- Program policy statement

## Application Information

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. Detailed description of project and amount of funding requested
5. Copy of current year's organizational budget and/or project budget
6. Listing of additional sources and amount of support

Initial approach: Letter of inquiry, see web site for required format

Copies of proposal: 1

Board meeting date(s): Three times per year

Deadline(s): None

Final notification: 3-4 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Walter A. Haas‡
- Elise S. Haas‡

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Jennifer C. Hass \*, Pres.
- Pamela H. David, Exec. Dir.  
Affiliation(s):  
*Northern California Grantmakers, Board Chair.*
- Elizabeth H. Eisenhardt  
Affiliation(s):  
*Evelyn and Walter Haas, Jr. Fund, Dir.*  
*Summer Bridge SF at University High, Adv. Board*
- John D. Goldman  
Affiliation(s):

*John and Marcia Goldman Foundation, Pres.*  
*Goldman Environmental Foundation, Dir.*  
*San Francisco Symphony, Pres.*  
*Bay Area Sports Organization, Tr.*  
*Stanford University Athletic Board, Vice-Chair.*  
*Board of Managers, Swarthmore College, Tr.*

- William S. Goldman  
Affiliation(s):  
*Haas-Koshlad Award, Mem. Election Committee*
- Peter E. Haas, Jr.  
Affiliation(s):  
*Levi Strauss Foundation, Dir.*  
*Red Tab Foundation, Pres.*
- Walter J. Haas  
Affiliation(s):  
*Team-Up for Youth, Chair. and Tr.*  
*Evelyn and Walter Haas, Jr. Fund, Co-Chair. and Tr.*  
*Golden Gate National Parks Conservancy, Tr.*  
*Governors Council on Physical Fitness, Tr.*

## **Staff**

### **Number of Staff**

6 full-time professional  
4 full-time support  
1 shared staff (shared with )

### **Key Staff**

*Note: Does not include officers.*

- Amanda Feinstein, Sr. Prog. Off., Economic Security
- Susan Kagehiro, Prog. Off., Education
- Marcel Marania, Grants Mgr.
- Frances N. Phillips, Prog. Dir., Arts and Creative Work Fund
- Stephanie Rapp, Sr. Prog. Off., Jewish Life and Spec Projects

## **Memberships**

### **Regional Associations of Grantmakers**

- Northern California Grantmakers

### **Affinity Groups**

- Asset Funders Network
- Grantmakers Concerned with Immigrants and Refugees
- Grantmakers for Education
- Grantmakers for Effective Organizations
- Grantmakers In the Arts
- National Committee for Responsive Philanthropy
- Neighborhood Funders Group
- Philanthropy for Active Civic Engagement (PACE)

### **Associations and Other Philanthropic Organizations**

- Council on Foundations
- Independent Sector
- Women & Philanthropy

## **Financial Data**

Year ended 2012-12-31

Assets: \$215,734,747 (market value)

Expenditures: \$15,685,399

Total giving: \$11,426,402

Qualifying distributions: \$13,666,102

Giving activities include:

\$11,414,702 for 387 grants (high: \$1,000,000; low: \$380)

\$11,700 for 27 employee matching gifts

\$458 for foundation-administered programs

## **Online Communications**

- [Walter and Elise Haas Fund's Philanthropy Promise](#)
- [Blog](#)
- [Knowledge Center](#)
- [Grants Database](#)
- [Twitter](#)

## Additional Location Information

County: San Francisco

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$1,000,000 to Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties, San Francisco, CA, in 2012.
- \$125,000 to Jewish Community Center of San Francisco, San Francisco, CA, in 2012.
- \$125,000 to Oakland Unified School District, Oakland, CA, in 2012. For African American Male Achievement Initiative
- \$120,000 to Alliance for California Traditional Arts, Fresno, CA, in 2012.
- \$65,000 to San Francisco Organizing Project, San Francisco, CA, in 2012.
- \$40,000 to Pivot Learning Partners, San Francisco, CA, in 2012.
- \$40,000 to Joshua Venture Philanthropies, New York, NY, in 2012.
- \$20,000 to Center for Cultural Innovation, Los Angeles, CA, in 2012.
- \$15,000 to Mission Neighborhood Centers, San Francisco, CA, in 2012.
- \$7,500 to Independent Sector, Washington, DC, in 2012.

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## The Community Foundation of Western North Carolina, Inc.

**Last Updated:** 2014-08-29

### At A Glance

4 Vanderbilt Park Dr., Ste. 300  
 Asheville, NC United States 28803  
 Telephone: (828) 254-4960  
 Contact: Diane Crisp, Grants Mgr.  
 Fax: (828) 251-2258  
 E-mail: [crisp@cfwnc.org](mailto:crisp@cfwnc.org)  
 URL: [www.cfwnc.org](http://www.cfwnc.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2013-06-30)  
 Assets: \$211,579,611  
 Total giving: \$9,196,375

### EIN

561223384

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Mailing Address: P.O. Box 1888, Asheville, NC 28802-1888

### Background

Incorporated in 1978 in NC.

The Community Foundation of Western North Carolina was incorporated December 20, 1978, as the Community Foundation of Greater Asheville, Inc., following a feasibility study chaired by Raymond A. Hust under sponsorship of the United Way of Asheville and Buncombe County and the Junior League of Asheville. The Foundation's initial purpose was to support the public well-being and improve the quality of life in Buncombe County. In 1982, the Foundation's Articles of Incorporation were amended to include the 18 counties of Western North Carolina in the focus of its work and grantmaking activity.



## **Limitations**

Giving limited to Avery, Buncombe, Burke, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, McDowell, Mitchell, Polk, Rutherford, Swain, Transylvania, and Yancey counties, NC.

No support for religious organizations or sectarian purposes (except from designated funds).

No grants to individuals (except for undergraduate student scholarships), or for capital campaigns, endowment funds, start-up funds, or debt retirement.

## **Purpose and Activities**

The Community Foundation of Western North Carolina inspires philanthropy and mobilizes resources to enrich lives and communities in Western North Carolina.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Asheville Merchants Fund Grants**

The foundation provides grants of up to \$50,000 over two years to support economic growth and improve quality of life in Buncombe County. Visit foundation web site for application guidelines.

### **Biltmore Lakes Charitable Fund Grants**

The foundation provides grants of up to \$7,500 or more to support charitable projects improving the quality of life by supporting education, economic development, health care and other projects that promote community development in the Enka-Chandler area. Visit foundation website for application guidelines.

### **Black Mountain-Swannanoa Valley Endowment Fund Grants**

The foundation seeks to promote philanthropy and strengthen charitable organizations serving the Swannanoa Valley by making grants relating to health and wellness, education, cultural and natural resources and people in need. Grants range from \$2,500-\$10,000. Visit foundation website for application guidelines.

### **Cashiers Community Fund Grants**

The foundation supports initiatives that improve the quality of life in the greater Cashiers community by supporting projects that benefit the broad community and its residents. Grants range from \$2,500 to \$10,000.

### **Janirve SUN Grants**

The foundation provides grants to projects assisting human service nonprofit organizations experiencing an unforeseen crisis that impacts their ability to continue to provide critical services. Grants are for up to \$10,000. Visit foundation website for application guidelines.

### **Learning Links Grants**

The foundation provides grants of up to \$800 for public schools in Avery, Graham, Jackson, Madison, Mitchell, Polk, Rutherford and Swain counties to offer hands-on learning activities in the classroom. Visit foundation web site for application guidelines.

### **Melvin R. Lane Fund Grants**

The foundation provides grants of up to \$150,000 over three years to support organizational development and collaborative approaches for human service nonprofits. Visit foundation web site for application guidelines.

### **People in Need**

The foundation supports outstanding projects that promise significant impact for economically disadvantaged people. Grants are for up to \$20,000. Visit foundation website for application guidelines.

### **Pigeon River Fund Grants**

The foundation provides grants of up to \$25,000 to nonprofits in Haywood, Madison and Buncombe counties that are working to improve water quality. Visit foundation web site for application guidelines.

### **Ramble Charitable Fund Grants**

The foundation provides grants of up to \$2500 or more to support charitable projects in southern Buncombe communities. Visit foundation web site for application guidelines.

### **Scholarships**

The foundation's scholarships are open to North Carolina residents who are public high school seniors, who attend the NC School of Science and Mathematics or the UNC School of the Arts High School or who study in a home school registered with the North Carolina Division of Non-Public Education. There are programs open to private high school students in Buncombe County, and a few programs open to students already in college or who are employees or children of employees of certain area corporations. Applicants must demonstrate financial need (unless otherwise noted), academic achievement or potential, history of active participation in school activities, community service, extracurricular involvement, and/or work experience, and strong moral character; additional eligibility requirements vary per specific programs. See web site for more information.

### **WNC Nonprofit Pathways Capacity Grant Program**

The foundation supports charitable projects which improve the organizational capacity and management capabilities of nonprofits serving Western North Carolina. Grants are for up to \$7,500. Visit foundation website for application guidelines.

### **Women for Women Grants**

The foundation provides grants of up to \$100,000 to improve the lives of financially disadvantaged women and girls in the 18-county region. Visit foundation web site for application guidelines.

## **Fields of Interest**

### **Subjects**

- Agriculture/food, reform
- Arts
- Children/youth, services
- Community/economic development
- Education
- Human services
- Nonprofit management

### **Population Groups**

- Children/youth
- Economically disadvantaged
- Girls
- Infants/toddlers
- Women

## **Geographic Focus**

- North Carolina

## **Types of Support**

- Curriculum development
- Endowments
- Equipment
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Scholarship funds
- Scholarships--to individuals
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Financial statement
- Newsletter

## **Application Information**

Visit foundation web site for online application link, guidelines, and specific deadlines.

Application form required.

Initial approach: Telephone or e-mail, online letter of intent or application

Copies of proposal: 1

Board meeting date(s): Quarterly, 2nd Wed. in Feb., May, Aug., and Nov.

Deadline(s): Varies

Final notification: Varies

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- James W. Stickney, IV \*, Chair.
- A.C. Honeycutt, Jr. \*, Vice-Chair.
- Elizabeth Brazas \*, Pres.
- Sheryl Aikman, V.P., Devel.
- Philip Belcher, V.P., Progs.
- Graham Keever, C.F.O.
- Laurence Weiss \*, Secy.
- G. Edward Towson, II \*, Treas.
- Maureen B. Adams
- William Clarke

- Jennie Eblen
- Ernest E. Ferguson
- Charles Frederick
- Howell A. Hammond
- Darryl Hart
- Susan Jenkins
- Stephanie Norris Kiser
- Tina McGuire
- Lowell R. Pearlman
- Ramona C. Rowe
- George W. Saenger
- Anna S. "Candy" Shivers
- Jerry Stone
- Sarah Sparboe Thornburg
- Stephen Watson
- Sharon Kelly West

## Staff

### Number of Staff

14 full-time professional  
 2 part-time professional  
 2 full-time support

### Key Staff

*Note: Does not include officers.*

- Spencer Butler, Donor Rels. Off.
- Diane Crisp, Grants Mgr.
- Becky Davis, Devel. Off.
- Naomi Davis, Acctg. Assoc.
- Virginia Dollar, Prog. Off.
- Lindsay Hearn, Comms. Dir.
- Maria Juarez, Scholarship Off.
- Tim Richards, Sr. Prog. Off.
- Beth Semadeni, Off. Mgr.
- Tara Scholtz, Sr. Prog. Off.
- Janet Sharp, Staff Acct.
- Sally Weldon, Dir., Information Technology
- Marcia Whitney, Regional Devel. Off.

## Memberships

### Regional Associations of Grantmakers

- North Carolina Network of Grantmakers

### Affinity Groups

- Community Foundations of America

### Associations and Other Philanthropic Organizations

- Council on Foundations
- North Carolina Center for Nonprofits

## Financial Data

Year ended 2013-06-30

Assets: \$211,579,611 (market value)

Gifts received: \$16,389,983

Expenditures: \$11,854,483

Total giving: \$9,196,375

Qualifying distributions: \$10,668,791

Giving activities include:

\$8,876,025 for 328 grants (high: \$277,000

\$320,350 for 146 grants to individuals

## Online Communications

- [Facebook](#)
- [Grants Database](#)
- [YouTube](#)

## Additional Location Information

County: Buncombe

Metropolitan area: Asheville, NC

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$830,000 to Foundation for Excellence in Mental Health Care, Wilsonville, OR, in 2012.
- \$500,000 to Carleton College, Northfield, MN, in 2012.
- \$101,750 to YMCA Blue Ridge Assembly, Black Mountain, NC, in 2012.
- \$80,000 to Haywood Waterways Association, Waynesville, NC, in 2012.
- \$25,000 to Mountain View Baptist Church, Black Mountain, NC, in 2012.
- \$2,500 to Saint Timothys School, Stevenson, MD, in 2012.
- \$2,500 to United Way of Greater Portland, Portland, ME, in 2012.
- \$2,100 to YWCA of Asheville and Western North Carolina, Asheville, NC, in 2012.
- \$2,000 to Nature Conservancy, Columbia, SC, in 2012.
- \$2,000 to Pisgah Forest Baptist Church, Pisgah Forest, NC, in 2012.

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## The Merck Company Foundation

**Last Updated:** 2014-01-08

### At A Glance

1 Merck Dr. , P.O. Box 100  
Whitehouse Station, NJ United States 08889-3400  
Telephone: (908) 423-1000  
Contact: Brian Grill, Exec. V.P.  
Fax: (908) 423-1987  
E-mail: [OCP\\_TMCFSupport@Merck.com](mailto:OCP_TMCFSupport@Merck.com)  
URL: [www.merckresponsibility.com/giving-at-merck/f...](http://www.merckresponsibility.com/giving-at-merck/f...)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$211,572,454  
Total giving: \$42,861,890

### EIN

226028476

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

Additional tel.: (908) 423-1000; Contact for Neighbor of Choice Program in New Jersey: Doreen Robert, e-mail: [doreen\\_robert@merck.com](mailto:doreen_robert@merck.com); Additional e-mail: [corporate\\_responsibility@merck.com](mailto:corporate_responsibility@merck.com)

### Background

Incorporated in 1957 in NJ.

### Limitations

Giving on a national and international basis in areas of company operations, with emphasis on CA, Washington, DC, IL, MA, MD, NJ, NY, PA, TN, TX, VA, and WY, and in Africa, China, and Puerto Rico.

No support for political organizations, fraternal, labor, or veterans' organizations, religious organizations not of direct benefit to the entire community, or discriminatory organizations.

No grants to individuals, or for capital campaigns, endowments, basic or clinical research projects including epidemiological studies, clinical trials, or other pharmaceutical studies, direct medical care including medical screening or testing, or the purchase of medicines, vaccines, or devices, meetings, conferences, symposia or workshops that do not have or are not associated with long-term program objectives, unrestricted general operating support, or fundraising events including concerts, sporting events, annual appeals, membership drives, benefit dinners, or galas unrelated the strategic priorities of the Merck Company Foundation.

## **Purpose and Activities**

The foundation supports programs designed to promote health, education, and community. Special emphasis is directed toward programs designed to improve healthcare quality and capacity; increase access to care for underserved populations in select disease areas of global need; enhance STEM education at the graduate and post-graduate level; advance woman and minorities in the sciences; and programs that share Merck innovation and Merck employee expertise to address critical health and social issues in communities where Merck has a presence.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **African Comprehensive HIV/AIDS Partnerships (ACHAP)**

The foundation, in partnership the Bill & Melinda Gates Foundation, promotes the improvement of HIV/AIDS prevention, care, and treatment in Botswana. The initiative includes Merck medications for the Botswana's national antiretroviral (ARV) treatment program; and HIV prevention efforts focusing on safe male circumcision, intervention for young women and girls, HIV counseling and testing services, and integration for HIV and TB services.

### **Alliance to Reduce Disparities in Diabetes**

The foundation supports programs designed to decrease diabetes disparities and enhance the quality of healthcare by improving prevention and management services, with emphasis on low-income and underserved populations with a high prevalence of type 2 diabetes. The program is limited to Chicago, Illinois, Camden, New Jersey, Memphis, Tennessee, Dallas, Texas, and Fort Washakie, Wyoming. Visit URL: <http://ardd.sph.umich.edu/> for more information.

### **China-MSD HIV/AIDS Partnership**

The foundation, in partnership with China's Ministry of Health, supports HIV/AIDS prevention, patient care, and treatment in China. The initiative is designed to raise awareness and reduce discrimination among target populations; reduce HIV transmission through integrated risk-reduction; provide consecutive treatment and care to people living with HIV/AIDS through an established service network; provide support to orphans and families affected by HIV; build capacity of healthcare works and organizations; and strengthen HIV surveillance, monitoring, and evaluation systems and data management to track program implementation, access, and outcomes.

### **HIV Care Collaborative for Underserved Populations**

The foundation, in partnership with The George Washington University's School of Public Health and Health Services, supports health departments in Atlanta, Houston, and Philadelphia to connect people living with HIV to the care they need to stay healthy. The program is designed to improve timely access to quality HIV care for underserved adult populations; reduce new HIV infections among populations at the greatest risk; and share lessons learned to further develop initiatives that connect people living with HIV/AIDS to treatment.

### **Merck Childhood Asthma Network, Inc. (MCAN)**

The foundation created MCAN, a 501(c)(3) organization, to support and advance evidence-based programs that improve the quality of life for children with asthma and their families. The organization supports programs designed to tailor asthma case management and reduce environmental risk factors and triggers in the home; the American Academy of Pediatrics to support education for pediatricians to implement asthma diagnosis and implementation; the National Education Association to train educators to recognize asthma symptoms and manage acute episodes; and various partnership organizations to advocate support for science-based asthma care.

### **Merck Institute for Science Education (MISE)**

The foundation created the MISE to improve science education for K-12 students and to influence educational policy. Special emphasis is directed toward STEM, science, technology, engineering, and mathematics. Visit URL: <http://www.mise.org/secure/index.html> for more information.

### **Merck Vaccine Network - Africa (MVN-A)**

Through MVN-A, the foundation develops training centers in Africa to help increase the capacity of immunization programs to effectively deliver vaccines. The MVN-A training programs provide mid- to high-level immunization program managers in Kenya, Mali, Uganda and Zambia with customized, hands-on training in vaccine management and immunization services.

### **Neighbor of Choice Program**

Through the Neighbor of Choice program, the foundation addresses community and quality of life issues in communities where Merck has a major presence. Grants of up to \$50,000 are awarded to support programs that promote the health and well-being of community residents and grants of up to \$25,000 can be awarded to local nonprofit organizations that serve a wider range of community needs, including through arts, environmental and educational programs.

### **Partnership for Giving/Touched by an Agency**

The foundation matches contributions made by U.S. and Puerto-Rico based employees and retirees of Merck to organizations involved with arts and culture, education, the environment, animal welfare, health, and human services, up to \$30,000 a year. The foundation also awards a \$1,000 "Thank You Grant" to nominated nonprofit organizations that have made a difference in the lives of Merck employees.

### **Rx for Hunger**

Through Rx to Fight Hunger initiative, the foundation supports hunger-related local and regional partnerships to develop, implement, and share approaches for treating and preventing hunger and malnutrition in children, seniors, and families.

Current partnerships include Sesame Workshop's "Food for Thought: Eating Well on a Budget" bilingual education outreach program, and the Drexel School of Public Health to develop approaches to treating child hunger and access to healthy food for low-income families in impoverished urban communities.

### **The Alliance/Merck Ciencia (Science) Hispanic Scholars Program**

The foundation, in partnership with the National Alliance for Hispanic Health, annually provides college scholarships, a 10-week summer internship, and a stipend each summer to Hispanic high school seniors to pursue a degree in a STEM field. The program is limited to Los Angeles, California, Elizabeth, New Jersey, and Brownsville, Texas. The program is administered by the National Alliance for Health. Visit URL: <http://www.alliancescholars.org/> for more information.

### **UNCF/Merck Science Initiative**

The foundation, in partnership with the United Negro College Fund, awards scholarships and fellowships to African-American biomedical students pursuing studies and careers in the biological and chemical sciences. The initiative is designed to expand the pool of world-class African-American biomedical scientists. The program is administered by the United Negro College Fund. Visit URL: <http://umsi.uncf.org/> for more information.

## **Fields of Interest**

### **Subjects**

- Aging, centers/services
- AIDS
- American Red Cross
- Animal welfare
- Arts
- Asthma
- Biomedicine
- Children, services
- Community/economic development
- Diabetes
- Disasters, preparedness/services
- Education
- Education, early childhood education
- Education, services
- Engineering/technology
- Environment
- Family services
- Food banks
- Food distribution, meals on wheels
- Food services
- Health care
- Health care, clinics/centers
- Health care, equal rights
- Health care, public policy
- Health organizations
- Higher education
- Human services
- Mathematics
- Medical care, community health systems
- Medical research
- Nutrition
- Pediatrics
- Public health
- Science
- Science, formal/general education

### **Population Groups**

- African Americans/Blacks
- Economically disadvantaged
- Hispanics/Latinos
- Minorities
- Women

### **Geographic Focus**

- California
- District of Columbia
- Illinois
- Massachusetts
- Maryland

- New Jersey
- New York
- Pennsylvania
- Puerto Rico
- Tennessee
- Texas
- Virginia
- Wyoming

## Types of Support

- Building/renovation
- Conferences/seminars
- Continuing support
- Curriculum development
- Employee matching gifts
- Employee volunteer services
- Fellowships
- Internship funds
- Management development/capacity building
- Program development
- Research
- Scholarship funds
- Seed money

## Publications

- Application guidelines
- Corporate giving report
- Program policy statement

## Application Information

Unsolicited applications are currently not accepted. Merck typically initiates specific requests for charitable contributions and donations.

Application form not required.

Board meeting date(s): Semiannually and as required

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Merck & Co., Inc.

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Kenneth C. Frazier \*, Chair.  
Affiliation(s):  
Merck &  
Co., Inc., Chair., Pres., and C.E.O.
- Geralyn S. Ritter \*, Pres.
- Brian Grill, Exec. V.P.
- Leslie M. Hardy, V.P.
- Jon Filderman, Secy.
- Mark E. McDonough, Treas.

## Memberships

### Regional Associations of Grantmakers

- Council of New Jersey Grantmakers
- Philanthropy New York

### Affinity Groups

- Funders Concerned About AIDS
- Grantmakers In Health

## Financial Data

Year ended 2012-12-31

Assets: \$211,572,454 (market value)

Expenditures: \$44,404,813  
Total giving: \$42,861,890  
Qualifying distributions: \$44,123,823  
Giving activities include:  
\$29,022,133 for 156 grants (high: \$4,223,342)  
\$13,839,757 employee matching gifts

## Online Communications

- [RSS Feed](#)
- [Grants List](#)
- [Merck Grants Management Website](#)

## Additional Location Information

County: Hunterdon

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New Jersey District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$4,223,342 to Merck Childhood Asthma Network, Washington, DC, in 2012. To enhance the quality of life for children with asthma and their families, and to reduce the burden of the disease on them and society
- \$3,500,000 to African Comprehensive HIV/AIDS Partnerships, White House Station, NJ, in 2012. To support and enhance Botswana's response to the HIV/AIDS epidemic through a comprehensive approach that includes HIV/AIDS prevention, treatment, care and support and impact mitigation
- \$3,390,905 to Merck Institute for Science Education, Rahway, NJ, in 2012. To improve science education from K-12th grade through teacher and program development
- \$1,250,000 to CARE USA, Atlanta, GA, in 2012. For Join My Village India
- \$1,000,000 to BroadReach Institute for Training and Education, Arlington, VA, in 2012. To implement Management and Leadership Academy (MLA) in Zambia
- \$1,000,000 to Childrens Inn at NIH, Bethesda, MD, in 2012. For general support
- \$216,510 to PYXERA Global, Washington, DC, in 2012. For Richard T. Clark Fellowship Program
- \$125,000 to Community Education Group, Washington, DC, in 2012. For project, The Road to AIDS
- \$50,000 to Eagles Charitable Foundation, Philadelphia, PA, in 2012. For Eagles Eye Mobile, which offers children in the Philadelphia area free eye exams and eyeglasses to children and their families
- \$25,000 to George Mason University Foundation, Fairfax, VA, in 2012. For Virginia Initiative for Science Teaching and Achievement (VISTA), initiative to innovate science education in Virginia and beyond by promoting hands-on, problem based learning that empowers teachers and engages students

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## Eugene and Agnes E. Meyer Foundation

Last Updated: 2014-09-05

### At A Glance

1250 Connecticut Ave. N.W., Ste. 800  
Washington, DC United States 20036-2620  
Telephone: (202) 483-8294  
Fax: (202) 328-6850  
E-mail: [info@meyerfdn.org](mailto:info@meyerfdn.org)  
URL: [www.meyerfoundation.org](http://www.meyerfoundation.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$199,664,078  
Total giving: \$5,992,970

### EIN

530241716

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)



## Background

Incorporated in 1944 in NY.

Mr. Meyer, a Wall Street financier, organized the Allied Chemical and Dye Corp. in 1921, now Allied Corp. Throughout his life he held several governmental positions, including director of the War and Finance Corp., governor of the Federal Reserve Board, chairman of the Reconstruction Finance Corp., and first president of the World Bank. In 1933, he purchased the Washington Post and assumed the active role of publisher. His wife, Agnes Ernst Meyer, was a journalist and social activist. The first woman reporter hired by the New York Sun, Mrs. Meyer maintained her interest in journalism throughout her life and was the author of four books and numerous articles. She was the founder of the Urban Service Corps and the National Committee for Support of the Public Schools. The foundation is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

## Limitations

Giving limited to the Washington, DC, metropolitan area, including, Montgomery and Prince George's counties in MD; Arlington County, City of Alexandria, City of Falls Church, City of Manassas Park, City of Manassas, Fairfax County, and Prince William County in VA.

No support for sectarian purposes, or for programs that are national or international in scope.

No grants to individuals, or for annual campaigns, deficit financing, endowment funds, equipment, scholarships, fellowships, scientific or medical research, publications, special events or conferences.

## Purpose and Activities

The mission of the foundation is to identify and invest in visionary leaders and effective community-based nonprofit organizations that are working to create lasting improvements in the lives of low-income people in the Washington, D.C. metropolitan region, and to work to strengthen the region's nonprofit sector as a vital and respected partner in meeting community needs.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Grantmaking

The foundation identifies and invests in visionary leaders and effective community-based nonprofit organizations that are working to create lasting improvements in the lives of low-income people in the Washington, DC, metropolitan region, and works to strengthen the region's nonprofit sector as a vital and respected partner in meeting community needs. The foundation's grantmaking is focused on four priority program areas: Education, Healthy Communities, Economic Security, and A Strong Nonprofit Sector.

### Management Assistance Program (MAP)

The program provides grants to current Meyer grantees to help strengthen their management and leadership so they can serve the community more effectively. MAP funds are available to help organizations a) strengthen executive and board leadership, b) conduct organizational planning and assessment, and c) improve financial management and sustainability.

## Fields of Interest

### Subjects

- Adult education--literacy, basic skills & GED
- Child development, education
- Child development, services
- Children/youth, services
- Civil rights, race/intergroup relations
- Civil/human rights
- Community/economic development
- Dental care
- Education
- Education, early childhood education
- Education, reading
- Elementary school/education
- Employment
- Family services
- Health care
- Health organizations
- Homeless, human services
- Human services
- Leadership development
- Legal services
- Mental health/crisis services
- Minorities/immigrants, centers/services

- Secondary school/education
- Substance abuse, services
- Urban/community development
- Vocational education
- Women, centers/services
- Youth development, services

### Population Groups

- Economically disadvantaged

### Geographic Focus

- District of Columbia
- Maryland
- Virginia

### Types of Support

- Consulting services
- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Technical assistance

### Publications

- Application guidelines
- Grants list
- Newsletter

### Application Information

Applicants should read the foundation's guidelines thoroughly at [www.meyerfoundation.org](http://www.meyerfoundation.org). Letters of inquiry should be submitted online via a link on the foundation's web site. The foundation will acknowledge receipt of all applications within two weeks. If further information is needed, the applicant will be contacted by a foundation staff member. The foundation may or may not invite a full proposal.

Application form required.

Initial approach: Online application available on foundation web site

Board meeting date(s): May and Oct.

Deadline(s): See foundation web site for current deadline

Final notification: Within 2 weeks after board meetings

### Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Eugene Meyer‡
- Agnes E. Meyer‡
- Marpat Foundation

### Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Joshua B. Bernstein \*, Chair.  
Affiliation(s):  
*Jewish Federation of Greater Washington, Dir.*  
*Diane and Norman Bernstein Family Foundation, V.P.*  
*Bernstein Management Corp., C.E.O. and Pres.*  
*Sidwell Friends School, Board Member*  
*Jewish Venture Philanthropy Fund, Founder*  
*UJA Endowment Fund, Board Member*  
*Tzedek Fund of Washington, Advisory Committee Member*
- Deborah Ratner Salzberg, Vice-Chair.  
Affiliation(s):  
*Forest City Washington, Inc., Pres.*  
*Forest City Enterprises, Inc., Dir.*  
*RMS Investment Corporation, Pres.*  
*Jewish Federation of Greater Washington, Off. and Board Member*  
*Washington Ballet, Advisory Board Member*

#### *Arts for the Aging, Board Member*

- Nicky Goren, C.E.O. and Pres.
- Janice A. Thomas, V.P., Finance and Ops.  
Affiliation(s):  
*Foundation Financial Officers' Group, Member*
- Richard L. Moyers, V.P. Progs. and Comm.
- Barbara Lang, Secy.-Treas  
Affiliation(s):  
*DC Chamber of Commerce, C.E.O. and Pres.*  
*Federal Reserve Bank of Richmond, Board Member*  
*DC Workforce Investment Council, Chair.*  
*Howard University Institute for Entrepreneurship, Leadership and Innovation, National Advisory/Board Member*  
*Southeastern University, Board Member*  
*The Lab School of Washington, Board Member*  
*Washington Home and Hospice, Board Member*  
*Washington Convention and Tourism Corp., Board Member*  
*Downtown Business Improvement District, Board Member*  
*District of Columbia Education Compact, Board Member*  
*District of Columbia Business Coalition, Board Member*
- Antoinett "Toni" Cook Bush
- William Dunbar
- Newman T. Halvorson, Jr.  
Affiliation(s):  
*Covington & Burling LLP, Retired Partner*
- Barbara J. Krumsiek  
Affiliation(s):  
*Calvert Group, Ltd., C.E.O. Chair. and Pres.*  
*Acacia Life Insurance Co., Chair.*
- Ginger Lew
- Jim Sandman  
Affiliation(s):  
*District of Columbia Bar, Pres. and Member, Board of Governors*  
*University of Pennsylvania Law School, Member, Board of Overseers*  
*NALP Foundation for Law Career Research and Education, Tr.*  
*American Bar Association, Fellow and Member, House of Delegates*  
*District of Columbia Public Schools, General Council*
- Lidia Soto-Harmon  
Affiliation(s):  
*Girl Scout Council of the Nation's Capital, C.E.O.*
- Robert G. Templin, Jr., Ph.D.  
Affiliation(s):  
*Northern Virginia Community College, Pres.*
- Kerrie B. Wilson  
Affiliation(s):  
*Reston Interfaith, Inc., C.E.O.*  
*Nonprofit Roundtable of Greater Washington, Board Member*  
*Virginia Interfaith Center for Public Policy, Board Member*

## **Staff**

### **Number of Staff**

5 full-time professional

2 part-time professional

4 full-time support

### **Key Staff**

*Note: Does not include officers.*

- Jennifer Burke, Business Ops. Assoc.
- Karen FitzGerald, Sr. Prog. Off.
- Carmen James Lane, Sr. Prog. Off.
- Danielle M. Reyes, Sr. Prog. Off.
- Maegan L. Scott, Prog. and Comm. Coord.
- Katie Shaw, Exec. Asst., Pres.
- Jane Robinson Ward, Grants Mgr. and Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Washington Regional Association of Grantmakers

### Affinity Groups

- Asian Americans/Pacific Islanders in Philanthropy
- Black Philanthropic Alliance
- Exponent Philanthropy
- Grantmakers for Education
- Grantmakers for Effective Organizations
- Neighborhood Funders Group
- Youth Transition Funders Group

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Grants Managers Network

## Financial Data

Year ended 2012-12-31

Assets: \$199,664,078 (market value)

Gifts received: \$3,023

Expenditures: \$10,909,533

Total giving: \$5,992,970

Qualifying distributions: \$8,733,644

Giving activities include:

\$5,992,970 for 241 grants (high: \$100,000; low: \$1,000)

\$29,020 for 4 foundation-administered programs

## Online Communications

- [Facebook](#)
- [Grants Database](#)
- [E-Newsletter](#)
- [Twitter](#)
- [Vimeo](#)
- [YouTube](#)
- [Eugene and Agnes E. Meyer Foundation's Philanthropy's Promise](#)

## Additional Location Information

County: District of Columbia

Metropolitan area: Washington-Arlington-Alexandria, DC-VA-MD-WV

Congressional district: District of Columbia District At-large

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$150,000 to New Schools Fund, Oakland, CA, in 2010. For the DC Schools Fund
- \$100,000 to Advocates for Justice and Education, Washington, DC, in 2010. For executive leadership development through the Exponent Award
- \$100,000 to Metro TeenAIDS, Washington, DC, in 2010. For executive leadership development through the Exponent Award
- \$60,000 to Washington Interfaith Network, Washington, DC, in 2010. For the Vote Neighborhoods First Investment Campaign and Virginians Organized for Interfaith Community Engagement
- \$50,000 to Cultural Development Corporation of the District of Columbia, Washington, DC, in 2010. For general operations
- \$50,000 to Urban Alliance Foundation, Washington, DC, in 2010. For general operations
- \$40,000 to Arlington Free Clinic, Arlington, VA, in 2010. For general operations
- \$30,000 to Ayuda, Washington, DC, in 2010. For general operations
- \$25,000 to Little Lights Urban Ministries, Washington, DC, in 2010. For the academic programs in Potomac Gardens
- \$20,000 to Center on Budget and Policy Priorities, Washington, DC, in 2010. For the Defeat Poverty DC Campaign

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## The Bill, Hillary and Chelsea Clinton Foundation

Last Updated: 2013-06-04

## At A Glance

(formerly William J. Clinton Foundation)  
1200 President Clinton Ave.  
Little Rock, AR United States 72201-1749  
Contact: Andrew Kessel, C.F.O.  
E-mail: [akessel@clintonfoundation.org](mailto:akessel@clintonfoundation.org)  
URL: [www.clintonfoundation.org](http://www.clintonfoundation.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Celebrity: Politics
- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2011-12-31)  
Assets: \$197,890,114  
Total giving: \$6,810,664

## EIN

311580204

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Additional address (New York office): 77 Water St., New York, NY 10005-4401, tel.: (646) 775-9175; additional address (Boston office): 383 Dorchester Ave., Ste. 400, Boston, MA 02127-2422; additional address (Chicago office): 111 S. Wacker Dr., Ste. 4000, Chicago, IL 60606-4309

## Background

Established in 1997 in AR.

Founded by William Jefferson "Bill" Clinton. Mr. Clinton served as the Governor of Arkansas from 1979 to 1981, and again from 1983 to 1992. In 1992, he was elected as the 42nd President of the United States, and served two terms.

## Limitations

Giving on a national and international basis.

## Purpose and Activities

The foundation works to strengthen the capacity of governments and individuals to alleviate poverty, improve global health, strengthen economies, and protect the environment.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Alliance for a Healthier Generation Initiative

The alliance, a partnership between the foundation and the American Heart Association, works to eliminate childhood obesity and to inspire all young people in the United States to develop lifelong, healthy habits. The alliance has four key initiatives: Go Healthy Challenge (empowering youth to take the pledge to make their lives, schools and communities healthier through a comprehensive online, on-air, grassroots movement); Industry Program (working with major companies to provide kids and adolescents with healthier food, beverage and fitness opportunities); Healthcare Initiative (engaging healthcare companies and providers in the prevention and management of childhood obesity) and Healthy Schools Program (helping and rewarding schools for creating a healthy learning environment, including offering better food choices, physical activity options, and staff wellness programs)

### Clinton Climate Initiative (CCI)

The initiative was created with the mission of applying the foundation's business-oriented approach to the fight against climate change in practical, measurable, and significant ways. The initiative works with the C40 Large Cities Climate Leadership Group, an association of large cities dedicated to tackling climate change, to develop and implement a range of actions that will accelerate greenhouse gas emissions reductions.

### Clinton Economic Opportunity Initiative (CEO)

The initiative works to accelerate economic progress in underserved communities throughout the U.S. by promoting entrepreneurship and advancing business-to-business public service. Through programs that provide entrepreneurs with support, ideas, and tools that can help them succeed in the marketplace, the initiative aims to empower growing businesses,

create jobs, generate wealth, and promote lasting economic development. Through these programs, the initiative seeks to create, implement, and scale sustainable business models to support entrepreneurs and create lasting economic development in underserved communities.

### **Clinton Giustra Enterprise Partnership**

This initiative partners with the private sector, governments, local communities, and other non-governmental organizations (NGOs) to empower individuals in developing nations by providing them with the tools needed to work themselves out of poverty. The initiative focuses on job creation and income generation for low-income communities, primarily concentrating on the optimization of value chains and enterprise building centered on agriculture and tourism.

### **Clinton Global Initiative (CGI)**

The initiative seeks to be a non-partisan catalyst for action, bringing together global leaders (including heads of state, nonprofit organizations, charities, and business leaders) to discuss challenges facing the world today, and devise and implement innovative solutions to some of the world's most pressing challenges. The initiative culminates in an annual conference, at which each invited guest must make a specific commitment to address one of the focus areas discussed. Staff then monitors the progress and success of these commitments throughout the year. Each year, the initiative also hosts a meeting at a prestigious university to bring together young leaders, university presidents, and activists to address pressing global challenges in the areas of education, energy and climate change, global health, human rights and peace, and poverty alleviation. Interested applicants are required to make a 'commitment to action' that works to make a difference through concrete steps. Both individuals students and student groups are eligible to apply to attend the conference; travel and lodging costs will be reimbursed.

## **Fields of Interest**

### **Subjects**

- Economic development
- Environment
- Environment, climate change/global warming
- Environment, energy
- Health care
- Nutrition

## **Geographic Focus**

- National, International

## **Publications**

- Annual report

## **Application Information**

Contributes only to pre-selected organizations; unsolicited requests for funds not considered or acknowledged.

Application form not required.

## **Officers**

- Bruce R. Lindsey, C.E.O.
- Laura A. Graham, C.O.O.
- Andrew Kessel, C.F.O.
- Stephanie S. Streett, Exec. Dir.

## **Directors**

- Chelsea Clinton
- Terrence McAuliffe

## **Memberships**

### **Associations and Other Philanthropic Organizations**

- Council on Foundations

## **Financial Data**

Year ended 2011-12-31

Assets: \$197,890,114 (market value)

Gifts received: \$56,257,057

Expenditures: \$57,606,827

Total giving: \$6,810,664

Qualifying distributions: N/A

Giving activities include:

\$4,729,568 for grants

## Online Communications

- [YouTube](#)
- [Facebook](#)
- [Flickr](#)
- [Vimeo](#)
- [Twitter](#)

## Additional Location Information

County: Pulaski

Metropolitan area: Little Rock-North Little Rock-Conway, AR

Congressional district: Arkansas District 02

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## The Catholic Community Foundation of Minnesota

**Last Updated:** 2013-12-30

### At A Glance

(formerly The Catholic Community Foundation in the Archdiocese of St. Paul and Minneapolis)

2610 University Ave. W. , Ste. 500

St. Paul, MN United States 55114-1090

Telephone: (651) 389-0300

Contact: Jules Vierling, Grants Mgr.

Fax: (651) 389-0650

E-mail: [info@ccf-mn.org](mailto:info@ccf-mn.org)

URL: [www.ccf-mn.org](http://www.ccf-mn.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### Financial Data

(yr. ended 2012-06-30)

Assets: \$196,746,050

Total giving: \$6,012,483

### EIN

411744184

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

### Background

Established in 1992 in MN; supporting organization of the Arthur J. Popehn Family Foundation.

### Limitations

Grants are made to 501c3 organizations throughout the United States, providing they are in alignment with Catholic social and moral teachings.

No support for programs whose teachings are antithetical to that of the Roman Catholic Church.

No grants to individuals.

### Purpose and Activities

The foundation financially supports the spiritual, educational, and social needs of the Catholic community in the twelve-county area of St. Paul/Minneapolis, MN.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Community Priorities Fund

The program awards grants ranging from \$1,000 to \$5,000 to fund programs that improve the quality of life for vulnerable children and the elderly in the community.

#### Family Faith Endowment Program

Income provided for Catholic schools, religious education, youth ministerial enrichment, and pastoral outreach programs.

### **Grants Program**

One-time grants between \$1,000 and \$5,000 are available for organizations working within the foundation's service area that serve the most vulnerable elderly age 75 and over, at-risk kids age 5-14, and young mothers with families at risk. Priority will be given to organizations that utilize volunteers for delivery of service and with annual budgets under \$1 million.

### **Parish and School Endowments**

Tuition aid and program support provided for parishes and schools within the archdiocese.

### **Seminary Endowment Program**

Tuition support provided for seminarians, and for spiritual and educational development for teachers, priests, and those in ministry.

## **Fields of Interest**

### **Subjects**

- Catholic agencies & churches
- Education
- Human services

### **Geographic Focus**

- National
- Minnesota

### **Types of Support**

- Capital campaigns
- Continuing support
- Equipment
- General/operating support
- Program development
- Scholarship funds

### **Publications**

- Application guidelines
- Annual report
- Biennial report
- Financial statement
- Grants list
- Informational brochure
- Newsletter

## **Application Information**

Unsolicited applications are not accepted at this time. The foundation accepts the Minnesota Common Grant Application Form. Application form required.

Initial approach: Proposal (no more than 3 pages)

Copies of proposal: 1

Board meeting date(s): Mar., May, Aug., and Sept.

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Norbert Conzemius, Vice-Chair
- Anne Cullen Miller \*, Pres.

## **Staff**

### **Number of Staff**

10 full-time professional

2 part-time professional

### **Key Staff**

*Note: Does not include officers.*

- Jules Vierling, Grants Mgr.

## **Memberships**

### **Regional Associations of Grantmakers**



- Minnesota Council on Foundations

## Financial Data

Year ended 2012-06-30

Assets: \$196,746,050 (market value)

Gifts received: \$9,701,290

Expenditures: \$8,737,232

Total giving: \$6,012,483

Qualifying distributions: N/A

Giving activities include:

\$6,012,483 for grants

## Additional Location Information

County: Ramsey

Metropolitan area: Minneapolis-St. Paul-Bloomington, MN-WI

Congressional district: Minnesota District 04

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## Mimi and Peter Haas Fund

**Last Updated:** 2014-03-06

### At A Glance

(formerly Miriam and Peter Haas Fund)

201 Filbert St., 5th Fl.

San Francisco, CA United States 94133-3238

Telephone: (415) 296-9249

Contact: Lynn Merz, Exec. Dir.

Fax: (415) 296-8842

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$192,843,330

Total giving: \$6,767,270

## EIN

946064551

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Background

Incorporated in 1982 in CA.

The Miriam and Peter Haas Fund, a private foundation located in San Francisco, CA, was incorporated in 1982 and for the first ten years was administered by the trustees. In 1992, the fund received a large bequest. With new resources, the trustees hired staff, established a more formalized structure, and chose early childhood as their primary focus. Based upon research conducted in 1993 and 1994, fund staff and trustees developed a grantmaking framework to be implemented in stages over several years.

## Limitations

Giving primarily in San Francisco, CA; early childhood, direct service component is limited to San Francisco.

No grants to individuals.

## Purpose and Activities

The fund's primary focus is early childhood development. Support is for activities that provide San Francisco's young (ages 2-5), low-income children and their families with access to high-quality early childhood programs that are part of a comprehensive, coordinated system. The fund recognizes the importance of connecting the work of its direct service grants to the ongoing discussions of public policy and will seek specific opportunities to share and collaborate with organizations to

improve early childhood settings. The fund will also continue trustee-initiated grantmaking to arts, education, public affairs, and health and human services organizations.

## Fields of Interest

### Subjects

- Education, early childhood education

### Geographic Focus

- California

### Types of Support

- Annual campaigns
- Building/renovation
- Capital campaigns
- Continuing support
- Curriculum development
- Endowments
- Equipment
- General/operating support
- Matching/challenge support
- Program development

### Publications

- Annual report
- Financial statement
- Grants list

### Application Information

Contributes only to pre-selected organizations.

Application form not required.

Board meeting date(s): Approximately 4 times per year

### Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Peter E. Haas‡
- Miriam L. Haas
- Elise S. Haas‡

### Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Miriam L. Haas \*, Pres.
- Lynn Merz, Exec. Dir.
- Ari A. Lurie
- Daniel L. Lurie

### Staff

#### Number of Staff

5 full-time professional

#### Key Staff

*Note: Does not include officers.*

- September Jarret, Prog. Dir.
- Saeed H. Mirfattah, Prog. Dir.
- Martin D. Tilzer, Financial Mgr.

### Memberships

#### Regional Associations of Grantmakers

- Northern California Grantmakers

#### Affinity Groups

- Early Childhood Funders' Collaborative

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Independent Sector

## Financial Data

Year ended 2012-12-31

Assets: \$192,843,330 (market value)

Expenditures: \$10,461,454

Total giving: \$6,767,270

Qualifying distributions: \$7,913,522

Giving activities include:

\$6,767,270 for 255 grants (high: \$250,000; low: \$61)

\$2,230 for 1 foundation-administered program

## Additional Location Information

County: San Francisco

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$250,000 to Single Stop USA, New York, NY, in 2012. For San Francisco Anti-Poverty Program
- \$250,000 to Single Stop USA, New York, NY, in 2012. For San Francisco Anti-Poverty Program
- \$200,000 to Teach for America, San Francisco, CA, in 2012. For general operating support
- \$200,000 to Teach for America, San Francisco, CA, in 2012. For general operating support
- \$125,000 to San Francisco Unified School District, San Francisco, CA, in 2012. For programs for classes in Pre-Kindergarten to 3rd Grade
- \$100,000 to San Francisco Museum of Modern Art, San Francisco, CA, in 2012. For Modern Ball at Super Benefactor Level
- \$50,000 to Bay Area Discovery Museum, Sausalito, CA, in 2012. For Connections Program, comprehensive outreach program, that aims to create sustainable relationships between the Museum and the diverse communities of the Bay Area
- \$37,475 to Cross Cultural Family Center, San Francisco, CA, in 2012. For Model Centers Initiative at Visitacion Valley, Leland Street, enriched early childhood education center with a curriculum tailored to meet the specific needs of children living in extreme poverty and homelessness
- \$10,000 to Metropolitan Museum of Art, New York, NY, in 2012. For annual membership
- \$5,000 to FACES SF, San Francisco, CA, in 2012. For program materials and equipment for Bayview/Hunter's Point facility

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## Low Income Investment Fund

**Last Updated:** 2014-05-25

### At A Glance

100 Pine St., Ste. 1800

San Francisco, CA United States 94111-5204

Telephone: (415) 772-9094

Contact: Nancy O. Andrews, Pres. and C.E.O.

Fax: (415) 772-9095

E-mail: [info@liifund.org](mailto:info@liifund.org)

URL: [www.liifund.org](http://www.liifund.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2012-06-30)

Assets: \$192,789,956

Total giving: \$2,059,631

## EIN

990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 1984 in CA.

## Limitations

Giving primarily in CA and NY.

## Purpose and Activities

The fund works as a steward for capital invested in housing, child care, education, and other community-building initiatives, and provides a bridge between private capital markets and low-income neighborhoods.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Child Care Center Repayable Planning Grants

In order to increase the supply of quality, affordable licensed child care in California, the fund offers repayable grants of up to \$20,000 for early-stage planning for child care facilities development. Grants are designed to provide the flexible funding needed to plan, review, and assess the overall feasibility of eligible facility development and renovation projects. Applicants must be, or must be working with, an experienced center-based child-care or preschool operator.

### Child-Care Grants

Grants are available for California-based child-care providers to help plan, implement, and build affordable quality child-care centers throughout the state. Special funding opportunities are available to providers in Alameda County and the greater San Francisco area.

### Child-Care Loans

Interest-only development loans of up to \$1 million are available to enable worthwhile facilities projects in California and New York to come to fruition, providing capital on an interim basis until the project can be financed with a permanent loan.

## Fields of Interest

### Subjects

- Housing/shelter
- Housing/shelter, services

### Population Groups

- Economically disadvantaged

## Geographic Focus

- California
- New York

## Types of Support

- Building/renovation
- Capital campaigns

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Dan Letendre \*, Chair.  
Affiliation(s):  
*Urban Investment Group, Managing Dir.*
- Andrew Ditton \*, Vice-Chair.
- Mary Kaiser \*, Secy.
- Barry Zigas \*, Treas.
- Nancy O. Andrews
- Phyllis Caldwell
- Derek Douglas
- Pamela S. Johnson
- Kirsten Moy  
Affiliation(s):  
*Aspen Institute, Dir.*
- Joseph Reilly

Affiliation(s):  
*The Community Development Trust, Pres. and C.E.O.*

- Kathryn Rock  
Affiliation(s):  
*Calvert Foundation, C.F.O.*
- Ellen Seidman  
Affiliation(s):  
*Federal Reserve Bank of San Francisco, Fellow*
- Sarah Rosen Wartell  
Affiliation(s):  
*Urban Institute, Pres.*

## Memberships

### Affinity Groups

- National Children's Facilities Network

## Financial Data

Year ended 2012-06-30

Assets: \$192,789,956 (market value)

Gifts received: \$15,849,844

Expenditures: \$16,932,258

Total giving: \$2,059,631

Qualifying distributions: N/A

Giving activities include:

\$1,968,812 for 27 grants (high: \$375,175; low: \$5,000)

\$90,819 for grants to individuals

## Online Communications

- [Twitter](#)
- [Facebook](#)
- [RSS Feed](#)

## Additional Location Information

County: San Francisco

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 12

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# The Erie Community Foundation

**Last Updated:** 2014-01-09

## At A Glance

459 W. 6th St.

Erie, PA United States 16507-1215

Telephone: (814) 454-0843

Contact: Michael L. Batchelor, Pres.

Fax: (814) 456-4965

E-mail: [mbatchelor@eriecommunityfoundation.org](mailto:mbatchelor@eriecommunityfoundation.org)

URL: [www.eriecommunityfoundation.org](http://www.eriecommunityfoundation.org)

## Type of Grantmaker

Community foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$187,170,327

Total giving: \$8,514,550

## EIN

256032032

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## **Additional Contact Information**

Grant inquiry tel.: 814-454-0843

## **Background**

Established in 1935 in PA as Erie Endowment Foundation; renamed in 1970.

## **Limitations**

Giving limited to Erie County, PA.

No support for sectarian religious activities, fire departments, nursing homes, field trips, or school playgrounds.

No grants to individuals (except for scholarships), or for fundraising events, programs ads, vehicles, organization start-up costs, endowments, deficit financing, or operating expenses.

## **Purpose and Activities**

The mission of the foundation is to improve the quality of life for all in the region by evaluating and addressing community issues, building permanent charitable endowments and promoting philanthropic and community leadership.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Helping Today Grants**

Helping Today grants typically do not exceed \$50,000 and are limited to one year in duration. Helping Today Grants are awarded for: 1) time-limited program expansion; 2) enhancement of organizational quality; 3) expansion of outreach; 4) capital campaigns as approved by Community Fund Drives Committee; 5) technology needs with a documented 50% match; 6) vehicle purchase with a documented 50% match; and 7) great ideas that address community needs.

### **Shaping Tomorrow Grants**

Shaping Tomorrow grants support collaborative and multi-year efforts to address critical community needs as expressed by Erie Vital Signs. While, overtime, the foundation anticipates grantmaking in all Vital Signs program areas, Shaping Tomorrow Grants are awarded for efforts that address any of the eight Erie Vital Signs topical areas including; Cultural Vitality, Community & Civic Engagement, The Economy, Regional Cooperation, Health, Environment, Education and Brain Gain. While grants may be awarded in any of the eight topical areas, Foundation Trustees established three priority areas for funding; Health, Education and The Economy.

## **Fields of Interest**

### **Subjects**

- Arts
- Community/economic development
- Education
- Health care
- Human services

## **Geographic Focus**

- Pennsylvania

## **Types of Support**

- Building/renovation
- Capital campaigns
- Curriculum development
- Emergency funds
- Equipment
- Income development
- Land acquisition
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Publication
- Research
- Scholarships--to individuals
- Technical assistance

## **Publications**

- Application guidelines
- Annual report

- Financial statement
- Grants list
- Informational brochure (including application guidelines)
- Newsletter

## Application Information

Visit foundation web site for guidelines per grant type.

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Copy of most recent annual report/audited financial statement/990
3. Listing of board of directors, trustees, officers and other key people and their affiliations
4. Plans for cooperation with other organizations, if any

Initial approach: Online grant application for Helping Today grants; Letter of Inquiry for Shaping Tomorrow grants

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): Jan. 14, Apr. 15, July 16, and Sept. 30 for Helping Today grants; Feb. 1 and July 2 for Shaping Tomorrow grants

Final notification: Within 3 months

Additional information: Through the foundation's Erie Vital Signs project, it is measuring progress by comparing the community to similar regions, across eight brought topical areas: Cultural Vitality, Community & Civic Engagement, The Economy, Regionalism, Health, Environment, Pre K-12 Education and Brain Gain. See program areas descriptions for current priorities.

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert G. Dwyer, Esq. \*, Chair.
- Michael L. Batchelor \*, Pres.
- George E. Espy, V.P., Community Impact
- Erin D. Fessler, V.P., Comms.
- Sussanah Weis Frigon, V.P., Investor Rels.
- Barbara F. Sambrook, V.P., Finance and Admin.
- Russell S. Warner, Esq. \*, Secy.
- Clemont R. Austin
- Geoffrey P. Dunn, M.D.
- Thomas B. Hagen
- Timothy M. Hunter
- Susan Kemenyffy
- Lynn M. McBrier
- Tim Shuttleworth
- R. Anthony Snow, M.D.
- Maryann C. Yochim

## Trustee Banks

- Advest, Inc.
- BNY Mellon, N.A.
- National Bank & Trust Co.
- LPL Financial
- Merrill Lynch Trust Co.
- National City Bank
- PNC Bank, N.A.

## Staff

### Number of Staff

4 full-time professional

1 part-time professional

3 full-time support

### Key Staff

*Note: Does not include officers.*

- Khristina J. Brown, Dir., Comms. and Regional Affiliates
- Jocelyn Bush, Dir., Community Impact
- Amanda Schantz Lincoln, Dir., Acctg.
- Meghan O'Brien, Dir., Grants Processing
- Jayne M. Randall, Scholarship Coord.

- Robert F. Wooler, Dir., Nonprofit Partnership

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Ohio

### Affinity Groups

- BoardSource
- Grantmakers for Effective Organizations
- National Scholarship Providers Association
- Women's Funding Network

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$187,170,327 (market value)

Gifts received: \$14,633,682

Expenditures: \$10,975,010

Total giving: \$8,514,550

Qualifying distributions: \$9,186,484

Giving activities include:

\$8,514,550 for grants

## Online Communications

- [E-Newsletter](#)
- [YouTube](#)
- [Facebook](#)
- [Twitter](#)
- [RSS Feed](#)

## Additional Location Information

County: Erie

Metropolitan area: Erie, PA

Congressional district: Pennsylvania District 03

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## NCB Capital Impact

**Last Updated:** 2013-11-13

### At A Glance

(formerly NCB Development Corporation)

2011 Crystal City Dr., Ste. 800

Arlington, VA United States 22202-3734

Telephone: (703) 302-8000

Contact: Terry Simonette, Pres. and C.E.O.

Fax: (703) 647-3490

URL: [www.ncbcapitalimpact.org](http://www.ncbcapitalimpact.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2011-12-31)

Assets: \$186,533,367

Total giving: \$530,456

## EIN

521290127



## Background

Established in 1982 in DC.

## Limitations

Giving limited to Philadelphia, PA.

## Purpose and Activities

The corporation provides financial service and technical support to cooperatives and other democratically-structured, cooperative-like organizations, targeted toward newer, less established organizations and underserved communities whose residents are disadvantaged, low-income, and/or elderly persons with special needs.

## Fields of Interest

### Subjects

- Housing/shelter, development

### Population Groups

- Economically disadvantaged

## Geographic Focus

- Pennsylvania

## Publications

- Annual report
- Financial statement

## Application Information

Unsolicited requests for funds not considered or acknowledged.

Application form not required.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Terry Simonette, Pres. and C.E.O.
- Ellis Carr \*, C.F.O.
- Jane Garcia  
Affiliation(s):  
*La Clinica de La Raza, Inc., C.E.O.*
- Stephanie McHenry  
Affiliation(s):  
*Cleveland State University, V.P.*
- Ray J. Moncriff  
Affiliation(s):  
*Kentucky Highlands Investment Corp., Exec. V.P. and C.O.O.*
- Dana Pancrazi
- Charles E. Snyder
- Thomas Walsh
- Judy Ziewacz  
Affiliation(s):  
*State of Wisconsin Office of Energy Independence, Exec. Dir.*

## Memberships

### Affinity Groups

- Coalition for Nonprofit Housing and Economic Development

## Financial Data

Year ended 2011-12-31

Assets: \$186,533,367 (market value)

Gifts received: \$9,108,350

Expenditures: \$20,061,689

Total giving: \$530,456

Qualifying distributions: N/A  
Giving activities include:  
\$530,456 for 8 grants (high: \$290,456; low: \$15,000)

## Online Communications

- [LinkedIn](#)
- [Facebook](#)
- [Twitter](#)
- [YouTube](#)

## Additional Location Information

County: Arlington  
Metropolitan area: Washington-Arlington-Alexandria, DC-VA-MD-WV  
Congressional district: Virginia District 08

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## Enterprise Community Partners, Inc.

**Last Updated:** 2013-01-18

### At A Glance

(formerly The Enterprise Foundation)  
10227 Wincopin Cir., Ste. 500  
Columbia, MD United States 21044-3400  
Fax: (410) 964-1918  
E-mail: [mail@enterprisefoundation.org](mailto:mail@enterprisefoundation.org)  
URL: [www.enterprisefoundation.org](http://www.enterprisefoundation.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### Financial Data

(yr. ended 2011-12-31)  
Assets: \$185,651,350  
Total giving: \$19,914,851

### EIN

521231931

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Toll-free tel.: (800) 624-4298

### Background

Established in 1980 in MD.

### Limitations

Giving on a national basis.

### Purpose and Activities

The organization works to see that all low-income people in the U.S. have the opportunity to obtain fit and affordable housing, and to move up and out of poverty into the mainstream of American life.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Charrettes Grants

Grants for up to \$5,000 to assist housing developers with integrating green building systems in their developments and engage in a serious discussion of green design possibilities. Awards are given to affordable housing developers to coordinate a green design charrette.

### **Enterprise Bart Harvey Fellowship**

Fellows provide substantial and creative support to Enterprise's senior management on projects selected for their strategic importance to the partners' mission. One applicant is selected every other year for the two-year fellowship. Key selection criteria are an evidenced commitment to public service and demonstration of exceptional skills in technical analysis, teamwork, leadership, and communications.

### **Enterprise Rose Architectural Fellowship**

The fellowship creates partnerships between new architects and community-based organizations to direct the skills and passions of the architects in the service of low- and moderate-income communities. The fellowship is designed to promote architectural and community design in low-income communities and encourages architects to become life-long leaders in public service and community development.

### **Excellence in Urban Journalism Award**

Awarded in conjunction with The Freedom Forum, this program recognizes two journalists who have demonstrated quality reporting on major issues facing the nation's urban populations, particularly in inner cities, with a \$2,500 award. Broadcasts, articles or series written by one reporter or a team can qualify. Topics may include, but are not limited to, housing, community safety, community development, welfare-to-work, child care, and transportation. The piece should discuss how a city or community has been affected by the situation. Ideally, the entry should include reporting on the outcome or resolution of the situation, or show responses through such vehicles as editorials and letters to the editor.

### **Green Communities Grants**

This initiative works to build healthy, efficient homes for low-income people, and to make environmentally-sustainable development the mainstream in the affordable housing industry, by providing funds and expertise to enable developers to build and rehabilitate homes that are healthier, more energy-efficient, and better for the environment. Three types of grants are available under this program. Planning and construction grants award up to \$75,000 to cover planning and construction expenses, including additional costs of architectural work, engineering, site surveys, and costs associated with items such as a more efficient HVAC system, green materials, and energy-efficient appliances. Charettes grants of up to \$5,000 assist housing developers with integrating green building systems in their developments and engaging in a serious discussion of green design possibilities. Sustainability training grants of up to \$5,000 are also available for affordable housing developers, to cover the design and distribution of building operations and maintenance. Under this initiative, loans are also available to fund any or all of the typical costs related to affordable housing development prior to closing construction financing, or the acquisition of land or buildings intended to be developed as affordable homeownership or rental housing. Eligible applicants include 501(c)(3) nonprofits, public housing authorities, tribally-designated housing entities, for-profit entities, and for-profit entities participating through joint ventures with qualified organizations. Visit <http://www.greencommunitiesonline.org> for more information.

### **Jim and Patty Rouse Award**

This program celebrates the important work being done by community-based and regional nonprofit organizations and eligible tribal entities that engage in affordable housing development and comprehensive community revitalization. A \$10,000 award (in unrestricted funds) will be presented to a member of the Enterprise Network who develops and provides quality affordable housing, and has a strong record of strategic planning and community building and excellent residential and community services. Eligible organizations must be members of the Enterprise Network, be financially sound, and have a proven track record of housing development and other community services.

### **Lowering the Cost of Housing Competition**

This competition is seeking submissions from multidisciplinary teams working to create multifamily affordable housing projects that improve neighborhoods and reduce traditional developmental and building costs. Up to \$250,000 in program-related investments will be awarded to the winning proposal. There is an additional \$50,000 in grant funds to be awarded to proposals that show innovation in practice or industry understanding of cost-lowering measures. Applications from teams comprised of architects, developers, and policy professionals are strongly encouraged, and entrants are further encouraged to develop creative collaborations that include policy makers, planners, social service providers, academic departments, and research institutes.

### **MetLife Foundation Awards for Excellence in Affordable Housing**

Administered in conjunction with the MetLife Foundation, this awards program recognizes 501(c)(3) community-based or regional nonprofit organizations and tribes or tribally-designated housing entities that excel in property and asset management or provide housing to senior citizens. Grants of \$50,000 each will be awarded to applicants that showcase models of excellence in the design, operations, and property management of affordable senior housing; and that increase the understanding of how to achieve success in providing innovative and high-quality independent living for seniors.

### **Sustainability Training Grants (Post-Construction)**

Grants of up to \$5,000 for affordable housing developers is available to cover the design and distribution of an operations and maintenance manual and the development as well as the implementation of a training curriculum that supports long-term operations and maintenance.

## **Fields of Interest**

### **Subjects**

- Housing/shelter, development
- Housing/shelter, public housing

## Geographic Focus

- National

## Types of Support

- Building/renovation
- General/operating support
- Land acquisition
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Informational brochure
- Newsletter

## Application Information

Contact local affiliate offices for local grant opportunities and information.

Application form required.

Initial approach: Download application form

Board meeting date(s): Jan., Apr., July, and Oct.

Deadline(s): Mar. 18 for Excellence in Urban Journalism Award; Apr. 18 for Jim and Patty Rouse Award; Apr. 20 for Green Communities Grants; May 26 for MetLife Foundation Awards for Excellence in Affordable Housing;

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Norman B. Rice \*, Chair.
- Doris W. Koo \*, Pres. and C.E.O.
- Bill Frey, Exec. V.P. and C.O.O.  
Affiliation(s):  
*JPMorgan Chase, Member, Community Advisory Board*  
*City of New York Department of Housing Preservation and Development, Member, Neighborhood Investment Advisory Panel*  
*Nonprofit Finance Fund, Member, Advisory Board*  
*Citizens Housing and Planning Council, Member*  
*Westhab, Member*  
*Mosholu Preservation Corporation, Member*
- Kelly Cartales, Sr. V.P.  
Affiliation(s):  
*Neighborhood Partnership Fund of Portland, Oregon, Board Member*
- Rafael E. Cestero, Sr. V.P. and Chief Prog. Off.
- Stockton Williams, Sr. V.P. and Chief Strategy Off.  
Affiliation(s):  
*National Housing Conference, Tr.*  
*Trust for Public Land, Member, Real Estate Council*
- Naomi Bayer, V.P., Field Ops.  
Affiliation(s):  
*National Housing Conference, Tr.*
- Mark McDermott, V.P., Central Region  
Affiliation(s):  
*Columbus Housing Partnership, Tr.*  
*Community Development Collaborative of Greater Columbus, Tr.*  
*Regional Housing and Community Development Alliance of St. Louis, Missouri, Tr.*  
*Neighborhood Progress, Inc. of Cleveland, Ohio, Tr.*
- Laura McGrath, V.P., Strategic Planning
- Mike McNeely, V.P. and C.F.O.
- Jim Polcaro, V.P. and C.I.O.
- Patricia T. Rouse \*, V.P. and Secy.  
Affiliation(s):  
*World Times, Inc., Member, Founders Committee*  
*Jubilee Housing of Washington, D.C., Dir.*  
*Howard County Poetry and Literature Society, Board Member*

- Abby Sigal, V.P.
- Kris Siglin, V.P., Knowledge Sharing
- Ali Solis, V.P., Public Policy  
Affiliation(s):  
*Quaint Acres Community Association, Pres.*  
*Silver Spring Interfaith Housing Coalition, Member*  
*Montgomery Housing Partnership, Dir.*
- Faith Thomas, V.P. and Genl. Counsel  
Affiliation(s):  
*Greater Baltimore Medical Center Foundation, Board Member*
- Sheila Turybury, V.P. and Chief Admin. Off.
- Peter Werwath, V.P.  
Affiliation(s):  
*Enterprise Advisors, Exec. Dir.*
- Catherine P. Bessant  
Affiliation(s):  
*Blue Cross and Blue Shield of Florida, Inc., Dir.*  
*The Bank of America Charitable Foundation, Inc., Vice-Chair.*  
*The Charlotte Chamber of Commerce, Chair.*  
*Children's Theatre of Charlotte, Dir.*
- Raymond R. Christman
- Sheila Crowley  
Affiliation(s):  
*National Low Income Housing Coalition, Member*
- John P. Boorn  
Affiliation(s):  
*Boorn Partners, Member*
- Jeffrey H. Donahue  
Affiliation(s):  
*Enterprise Community Investment, Pres. and C.E.O*
- Martin Fine  
Affiliation(s):  
*Holland & Knight, Member*
- Dora Leong Gallo  
Affiliation(s):  
*A Community of Friends, Member*

## Memberships

### Regional Associations of Grantmakers

- Association of Baltimore Area Grantmakers
- Philanthropy Northwest

### Affinity Groups

- Coalition for Nonprofit Housing and Economic Development
- Consortium of Foundation Libraries
- Neighborhood Funders Group

## Financial Data

Year ended 2011-12-31

Assets: \$185,651,350 (market value)

Gifts received: \$44,273,272

Expenditures: \$62,600,035

Total giving: \$19,914,851

Qualifying distributions: N/A

Giving activities include:

\$19,914,851 for grants

## Online Communications

- [Facebook](#)
- [LinkedIn](#)
- [RSS Feed](#)
- [Twitter](#)

- [Blog](#)
- [YouTube](#)

## Additional Location Information

County: Howard

Metropolitan area: Baltimore-Towson, MD

Congressional district: Maryland District 07

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## Eden Hall Foundation

**Last Updated:** 2014-01-08

### At A Glance

600 Grant St., Ste. 3232

Pittsburgh, PA United States 15219-2713

Telephone: (412) 642-6697

Contact: G.C. Greer

Fax: (412) 642-6698

URL: [www.edenhallfdn.org](http://www.edenhallfdn.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$182,218,653

Total giving: \$7,908,307

### EIN

251384468

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2002](#) [2001](#)

### Background

Established in 1984 in PA.

Eden Hall Foundation is a private foundation established pursuant to the will of Sebastian Mueller, a Pittsburgh philanthropist and vice president and director of the H.J. Heinz Company.

### Limitations

Giving limited to southwestern PA.

No support for private foundations, sectarian or denominational religious organizations (except those providing direct educational or health care services to the public), or political or fraternal organizations.

No grants to individuals, or generally for operating budgets, endowments, or deficit financing.

### Purpose and Activities

The foundation seeks to improve the quality of life in Pittsburgh and western Pennsylvania through support of organizations whose missions address the needs and concerns of the area. The foundation awards grants over four basic program areas: arts and culture; education; health; and social welfare.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Arts and Culture

The rich heritage of the Pittsburgh region is reflected in its many world-class cultural and arts organizations. The foundation is proud to be a contributor to so many prominent institutions. The foundation is also pleased to underwrite educational and outreach projects that take the arts out of performance halls and into schools. The foundation offers financial resources to parks and historic sites that provide both respites from the urban landscape and an opportunity to reflect upon our past. They are open to all in the region.

#### Education

The foundation supports a broad range of educational initiatives at privately funded institutions throughout western Pennsylvania. More than a dozen area colleges receive grants for capital programs and other higher education activities. Recently, the foundation has supported initiatives directed not only toward inner-city youth but also at students in suburban

school districts. Among the most innovative programs are outreach efforts that give students one-on-one exposure to wildlife, while honing their skills in math, science and literature. Other collaborative programs provide after-school activities and introduce children to the pleasure of books and the wonder of our three rivers. Minority students, including those in four-year colleges, benefit through gifts to various scholarship organizations.

## **Health**

Supporting high-quality health care and health-related services is of major interest to the foundation. But, the foundation's interest is not limited to traditional health care facilities. It has funded an array of initiatives and pilot projects to improve the overall health and well-being of people in southwestern Pennsylvania. These groundbreaking services include care for uninsured patients, assistance with prescription medicines, transportation to doctors' appointments, voucher programs for mammograms, and parenting education. Additional projects offer support services to people with lupus, multiple sclerosis and other diseases that limit mobility.

## **Social Welfare**

The foundation continues to honor the mission of Sebastian Mueller by providing relief, support, and assistance to low-income and disadvantaged individuals. Foundation grants enrich teen programs at the YWCA of Greater Pittsburgh, fund disaster relief offered by the American Red Cross and support the United Way of Allegheny County. Financial backing has gone to outreach programs that address alcoholism and which meet the needs of women inmates and those recently released from the justice system. Also receiving support are groups who care for homeless women and children and others fleeing domestic violence. Likewise, the foundation shares the vision of many nonprofit organizations whose missions are to relieve hunger or to meet the challenges of specialized childcare.

## **Fields of Interest**

### **Subjects**

- Agriculture/food
- American Red Cross
- Arts
- Arts education
- Education
- Environment, beautification programs
- Health care
- Higher education
- Human services
- Lupus
- Multiple sclerosis
- Recreation, parks/playgrounds
- Substance abuse, services
- YM/YWCAs & YM/YWHAs

### **Population Groups**

- Economically disadvantaged
- Women

## **Geographic Focus**

- Pennsylvania

## **Types of Support**

- Building/renovation
- Capital campaigns
- Endowments
- Equipment
- General/operating support
- Management development/capacity building
- Program development
- Program evaluation
- Research
- Scholarship funds

## **Publications**

- Application guidelines

## **Application Information**

Interviews or visitation may be necessary for additional information.

Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Statement of problem project will address
3. Copy of IRS Determination Letter
4. Brief history of organization and description of its mission
5. Copy of most recent annual report/audited financial statement/990
6. How project's results will be evaluated or measured
7. Listing of board of directors, trustees, officers and other key people and their affiliations
8. Detailed description of project and amount of funding requested
9. Copy of current year's organizational budget and/or project budget
10. Listing of additional sources and amount of support

Initial approach: Letter

Copies of proposal: 5

Board meeting date(s): Quarterly

Deadline(s): None

Additional information: In addition to above items, please also include information concerning the status of grants solicited from other foundations in the past twelve-month period (indicating the name of each foundation and amount requested)

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Eden Hall Farm

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- George C. Greer \*, Chair. and Pres.  
Affiliation(s):  
*The Pittsburgh Cultural Trust, Board Member*
- Debora S. Foster \*, V.P. and Secy.  
Affiliation(s):  
*H.J. Heinz Co., V.P., Corp. Comms.*
- John M. Mazur \*, V.P. and Treas.
- Sylvia V. Fields, Exec. Dir.
- Margaret P. Joy
- Charles J. Stout

## Staff

### Number of Staff

1 full-time professional

1 full-time support

1 part-time support

### Key Staff

*Note: Does not include officers.*

- Jordana Stephens, Prog. Off.
- Maureen White, Grants Asst.
- Linda Wozniak, Budget and Finance Off.

## Memberships

### Regional Associations of Grantmakers

- Grantmakers of Western Pennsylvania

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$182,218,653 (market value)

Expenditures: \$8,870,089

Total giving: \$7,908,307

Qualifying distributions: \$7,908,307

Giving activities include:

\$7,908,307 for 119 grants (high: \$780,000; low: \$200)



## Additional Location Information

County: Allegheny

Metropolitan area: Pittsburgh, PA

Congressional district: Pennsylvania District 14

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$780,000 to Pittsburgh Trust for Cultural Resources, Pittsburgh, PA, in 2012. For programming
- \$750,000 to Pittsburgh Parks Conservancy, Pittsburgh, PA, in 2012. For construction of Environmental Center at Frick Park
- \$500,000 to Pittsburgh Botanic Garden, Pittsburgh, PA, in 2012. For Phase I of the Building Plan
- \$400,000 to Carnegie Mellon University, Pittsburgh, PA, in 2012. To establish Energy Futures Institute and construct Bio, Energy, Nano Building
- \$333,000 to Westminster College, New Wilmington, PA, in 2012. For renovations to Patterson Hall
- \$250,000 to Pittsburgh Symphony, Pittsburgh, PA, in 2012. For program support
- \$250,000 to Adelphoi USA, Latrobe, PA, in 2012. For capital improvements to Margaret Home and Colony Home
- \$15,000 to Urban Impact Foundation, Pittsburgh, PA, in 2012. For Performing Arts and Options Programs
- \$15,000 to Dress for Success Pittsburgh, Pittsburgh, PA, in 2012. For Professional Women's Group and Career Center programs
- \$10,000 to Partners in Progress, Ligonier, PA, in 2012. For school construction in Deslandes, Haiti

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## John T. Gorman Foundation

**Last Updated:** 2014-02-25

### At A Glance

(formerly JTG Foundation)

1 Canal Plz., Ste. 800

Portland, ME United States 04101-4083

Telephone: (207) 518-6784

Contact: Martha E. Greene, Managing Dir.

Fax: (207) 518-6788

E-mail: [JTG@brannlaw.com](mailto:JTG@brannlaw.com)

URL: [www.jtgfoundation.org](http://www.jtgfoundation.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$179,667,955

Total giving: \$6,328,696

### EIN

010498551

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

Application address: c/o Brann & Isaacson, P.O. Box 3070, Lewiston, ME 04243-3070

### Background

Established in 1996 in ME.

### Limitations

Giving primarily in ME.

No grants to individuals.

### Purpose and Activities

Giving primarily to enhance mental health services, improve the care of those suffering from cancer, enhance the lives of the elderly, to provide for the unmet needs of low-income or otherwise disadvantaged children, enhance community services, and to aid under privileged residents of Maine.

## Fields of Interest

### Subjects

- Cancer
- Children, services
- Community/economic development
- Mental health/crisis services

### Population Groups

- Aging
- Economically disadvantaged

## Geographic Focus

- Maine

## Types of Support

- Matching/challenge support

## Application Information

Applications should be submitted electronically, via foundation web site.

Application form required.

Initial approach: Use online application form on foundation web site

Board meeting date(s): May and Nov.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- John T. Gorman, Jr.

## Officers and Directors

- Shawn O. Gorman \*, Chair.
- Jeffrey J. Gorman \*, Vice-Chair.
- Tony Cipollone, C.E.O. and Pres.
- Weston Bonney, Treas.
- Martha E. Greene
- Irving Isaacson
- Richard W. Petersen

## Memberships

### Regional Associations of Grantmakers

- Maine Philanthropy Center

### Affinity Groups

- Exponent Philanthropy

## Financial Data

Year ended 2012-12-31

Assets: \$179,667,955 (market value)

Gifts received: \$2,735,864

Expenditures: \$8,037,748

Total giving: \$6,328,696

Qualifying distributions: \$7,297,782

Giving activities include:

\$6,328,696 for 164 grants (high: \$1,000,000; low: \$500)

## Additional Location Information

County: Cumberland

Metropolitan area: Portland-South Portland-Biddeford, ME

Congressional district: Maine District 01

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$1,000,000 to Preble Street, Portland, ME, in 2012. To purchase and renovate Lighthouse Shelter for homeless teens
- \$200,000 to Opportunity Alliance, Portland, ME, in 2012. To support mental health care needs of individuals in the Greater Portland area
- \$200,000 to Wholesome Wave Foundation Charitable Ventures, Bridgeport, CT, in 2012. To support a sustainable model for helping Supplemental Nutrition Assistance Program (SNAP) recipients access healthy food through farmers markets
- \$190,000 to Maine Equal Justice Partners, Augusta, ME, in 2012. To support advocacy organizations working on policy issues facing disadvantaged Maine residents
- \$175,000 to Pine Tree Legal Assistance, Portland, ME, in 2012. To support several legal services programs for low-income Maine residents
- \$150,000 to Sunrise County Economic Council, Machias, ME, in 2012. For Community Technology Plan, which provides digital literacy education to residents and businesses in Washington County
- \$124,000 to Central Maine Community Health Corporation, Lewiston, ME, in 2012. For Healthy Androscoggin, initiative to build the capacity needed to address high lead poisoning rates in children living in downtown Lewiston
- \$25,000 to Portland, City of, Portland, ME, in 2012. For general operating support for Portland Free Clinic and to develop a long term sustainability plan for the clinic
- \$20,000 to Frannie Peabody Center, Portland, ME, in 2012. To provide services to people in Maine living with or at risk for HIV/AIDS
- \$12,500 to Waldo Community Action Partners, Belfast, ME, in 2012. For early education services for children and their parents from low-income and underserved households

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## North Carolina Rural Economic Development Center, Inc.

**Last Updated:** 2014-03-07

### At A Glance

4021 Carya Dr.  
Raleigh, NC United States 27610-2914  
Telephone: (919) 250-4314  
Contact: Patrick Woodie, Pres.  
Fax: (919) 250-4325  
E-mail: [info@ncruralcenter.org](mailto:info@ncruralcenter.org)  
URL: [www.ncruralcenter.org](http://www.ncruralcenter.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives more than 33 1/3% of its support from contributions, etc.

### Financial Data

(yr. ended 2012-06-30)  
Assets: \$173,718,148  
Total giving: \$53,487,941

### EIN

561552375

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

### Additional Contact Information

E-mail for Patrick Woodie: [pwoodie@ncruralcenter.org](mailto:pwoodie@ncruralcenter.org)

### Background

Established in 1987 in NC.

### Limitations

Giving primarily in NC.

### Purpose and Activities

The center seeks to develop, promote, and implement sound economic strategies to improve the quality of life of rural North

Carolina.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Building Reuse and Restoration Grants**

This program works to assist North Carolina communities in reusing and revitalizing commercial properties. Three categories of grants are available: the renovation of vacant buildings; the expansion and renovation of buildings currently in use by certain types of companies; and the renovation and/or construction of health care facilities. Eligible expenses include, but are not limited to, materials and labor to install HVAC systems, electrical systems, plumbing systems, fire alarm/suppression systems, roofing, flooring, carpentry, drywall, and paint. Eligible applicants include units of local government located in one of North Carolina's 85 rural counties; priority will be given to projects in severely distressed counties, and towns with populations of fewer than 5,000. Funding of up to \$480,000 per project is available; applicants must demonstrate a 1:1 cash match for any grant monies received under this program.

### **Community Development Corporation Grants**

This program funds community development corporations (CDCs) throughout North Carolina that carry out and/or support community economic development projects designed to improve the quality of life for residents in underdeveloped minority communities. Funded activities can include projects that promote business development, access to capital for local entrepreneurs, real estate development, small business development, commercial revitalization, housing development, and other issues that foster the economic growth and development of targeted communities. Grants of up to \$30,000 (for new applicants) and \$65,000 (for previously-funded applicants) are available.

### **Economic Innovation Grants Program**

This program provides grants (of up to \$100,000) to help spur business activity, job creation, and public/private investment in North Carolina's rural communities, specifically in four arenas: advanced manufacturing in rural communities; rural health care industry economic opportunities that support growth in higher-skill, higher-wage jobs and that have the potential to positively impact health outcomes in rural areas; value-added processing for farmers, natural resource producers, and commercial fishing; and innovative community economic development strategies that capitalize on the unique assets of a community to create jobs, grow incomes, and strengthen local economies. Eligible applicants must be units of local government, nonprofit 501(c)(3) organizations, or educational institutions that are located within one of North Carolina's 85 rural counties, or is a statewide or regional organizations serving rural counties.

### **Microenterprise Loan Program**

Loans, ranging from \$500 to \$25,000, are available to owners and operators of businesses in rural North Carolina or who have definite plans to do so, with the goal of promoting self-employment, small-scale business creation, and economic independence throughout the region. Eligible applicants must have a minimum credit score of 575, with no outstanding judgments or liens. Applicants must also be U.S. citizens or permanent residents, reside in North Carolina and are at least 18 years of age or older.

### **New Generation Leaders Program**

Grants of up to \$20,000 each will be awarded to thirty community teams throughout North Carolina that work to engage rural young people to become active in civic life and to make a positive and lasting contribution to the communities. This program offers challenge grants, training, and technical assistance to support the formation of youth and young adult action teams who will: become immersed in their community's history, culture, and economy; engage actively in community discussion and activities; reach out to other young people for their perspectives, ideas, and involvement; and design and implement an innovative community improvement project aimed at attracting and retaining young adults in the community.

### **North Carolina Small Towns Economic Prosperity Program**

This program provides grants to support economically-distressed small towns throughout North Carolina, especially those faced with economic hardships due to changes in the economy (such as manufacturing losses, loss of farms and farming operations, etc.) and/or natural disasters. Projects funded under this program should work to support economic recovery and revitalization in small towns through job creation, income growth, commercial investment, and business activity; and/or implement a comprehensive model of capacity building, technical assistance, and grant-making to spur revitalization efforts. Eligible applicants must be incorporated municipalities of fewer than 7,500 people located in any of the state's 85 rural counties, or a community designated as the county seat in a county that has no incorporated municipalities. Priority will be given to applications that: affect small towns that are severely distressed due to changes in the economy or natural disasters; show a commitment to participate in all aspects of the program; demonstrate that local government officials know and understand the benefits and responsibilities of participation; show an understanding of the importance of an inclusive community leadership team and its role in the development and implementation of programs; and demonstrate the potential for economic revitalization and recovery and economic transition. Grants of up to \$100,000 will be awarded, with a required five percent cash match.

### **Rural Hope Grants**

This program awards grants to stimulate economic development and job creation in distressed areas throughout North Carolina through constructing and expanding health care facilities. Grants may be awarded for the renovation or construction of buildings for use by one or more job-generating private or nonprofit health care entities. At least one new job should be located in the project building for every \$5,000 in grant funds; grants must be matched by at least an equal amount of private or public funds. Eligible applicants include units of local government located in one of North Carolina's 85 rural counties; priority will be given to projects in severely-distressed counties, and towns with populations of fewer than 5,000. Funding of up to

\$480,000 per project is available.

## Fields of Interest

### Subjects

- Community/economic development
- Economic development

### Geographic Focus

- North Carolina

### Types of Support

- Loans--to individuals

### Publications

- Application guidelines

## Application Information

Application form required.

Initial approach: Submit pre-application

Deadline(s): Jan. 4, Mar. 1, Apr. 19, June 21, and Oct. 12 for Building Reuse and Restoration Grants and Rural Hope Grants; Feb. 10 for North Carolina Small Towns Economic Prosperity Program; Oct. 5 for Community Development Corporation Grants; none for Microenterprise Loan Program

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Bill Gibson \*, Chair.  
Affiliation(s):  
*Region A Council of Local Governments, Exec. Dir.*  
*N.C. Department of Commerce's, Chair.*  
*Blue Ridge National Heritage Area, Vice-Chair.*  
*Region A Partnership for Children, Vice-Chair.*  
*Region A Partnership for Children, Board Member*
- Larry Wooten \*, 2nd Vice-Chair.  
Affiliation(s):  
*North Carolina Farm Bureau Federation, Pres.*
- Patrick Woodie \*, Pres.
- Mikki Sager \*, Secy.  
Affiliation(s):  
*Conservation Fund, V.P.*
- Curtis Wynn \*, Treas.  
Affiliation(s):  
*Roanoke Electric Cooperative, Exec. V.P. and C.E.O.*  
*National Rural Electric Cooperatives Association, Board Member*  
*North Carolina Electric Membership Cooperatives Association, Board Member*  
*Halifax Economic Development Commission, Chair.*
- Ted Alexander  
Affiliation(s):  
*Preservation North Carolina, Dir., Western Regional Office*  
*New Wilderness Adventures Ministry, Chair.*  
*North Carolina Housing Finance Agency, Member, Housing Partnership Board*  
*Isothermal Planning and Development Commission, Board Member*
- Andy Anderson  
Affiliation(s):  
*Community Innovations, Pres. and Co-Owner*
- Rex L. Baker
- Leslie Boney  
Affiliation(s):  
*University of North Carolina System, Associate V.P., Economic Development, Research, Policy and Planning*  
*Southern Growth Policies, Board Member*  
*North Carolina Economic Development Board, Board Member*  
*North Carolina Board of Science and Technology, Board Member*
- Janice Brumit

Affiliation(s):  
*University of North Carolina - Chapel Hill, Chair. and Tr.  
Blue Ridge National Heritage Area, Chair., Mgmt. Board*

- James S. Bryan  
Affiliation(s):  
*First Citizens Bank, Exec. V.P., Southeast Region*
- J. Keith Crisco
- Brian Crutchfield  
Affiliation(s):  
*North Carolina Community Foundation, Board Member*
- Ilana Dubester  
Affiliation(s):  
*North Carolina Governor's Council on Hispanic/Latino Affairs, Chair., Justice Committee*

## Financial Data

Year ended 2012-06-30

Assets: \$173,718,148 (market value)

Gifts received: \$33,697,490

Expenditures: \$61,702,237

Total giving: \$53,487,941

Qualifying distributions: N/A

Giving activities include:

\$53,487,941 for grants

## Additional Location Information

County: Wake

Metropolitan area: Raleigh-Cary, NC

Congressional district: North Carolina District 04

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## Community Foundation of Greater Birmingham

Last Updated: 2014-01-29

### At A Glance

(formerly The Greater Birmingham Foundation)

2100 First Ave. N., Ste. 700

Birmingham, AL United States 35203-4223

Telephone: (205) 327-3800

Contact: Kate Nielsen, Pres.; For grants: James McCrary, V.P., Grants and Evaluation

Fax: (205) 328-6576

E-mail: [info@foundationbirmingham.org](mailto:info@foundationbirmingham.org)

URL: [www.foundationbirmingham.org](http://www.foundationbirmingham.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$169,336,538

Total giving: \$17,706,427

### EIN

631209631

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Grant inquiry tel.: (205) 327-3812; Grant inquiry e-mail: [jmccrary@foundationbirmingham.org](mailto:jmccrary@foundationbirmingham.org); Scholarship inquiry e-mail: [swilkerson@foundationbirmingham.org](mailto:swilkerson@foundationbirmingham.org)

### Background

Established in 1959 in AL by resolution and declaration of trust; corporate side established in 1997.

The Community Foundation of Greater Birmingham was created by community leaders in 1959 as a savings account for the community and today serves the greater Birmingham area, including Jefferson, Shelby, St. Clair, Blount, and Walker counties. Grants and initiatives focus on strategies to achieve the results the community wants for itself. Dedicated to driving positive change, the foundation continues to innovate with the creation of Community Catalyst Funds as a new resource for transformational investments. The foundation consistently ranks in the top 100 among some 700 community foundations nationwide, based on assets (the size of endowments), grants made (the amount of dollars put back into the community each year) and gifts received (contributions to the foundation from donors). The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

## Limitations

Giving limited to Blount, Jefferson, Shelby, St. Clair, and Walker counties, AL.

No support for religious organizations for religious purposes.

No grants to individuals (except for scholarships), or for national fundraising drives, sponsorships of fundraising events, endowment funds, debt reduction or replacements of government fund cuts.

## Purpose and Activities

The foundation leverages gifts and bequests from many people to drive positive change, bring people together to address community issues, build on opportunities and achieve measurable results, and work in partnership with others to improve the life of the local region.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### **Result: Children are successful along the education pipeline.**

The foundation's strategies are to: 1) increase high quality early learning opportunities for birth to eight year olds; and 2) decrease high school dropout rate (a "dropout" is defined as a student who leaves school and does not re-enroll in school).

### **Result: Communities are sustainable, livable and vibrant.**

The foundation's strategies are to: 1) expand and improve public greenspace; 2) further develop vibrant city center for Birmingham; 3) improve the natural environment; and 4) expand access to arts and cultural opportunities.

### **Result: Individuals and families are economically secure.**

The foundation's strategies are to: 1) improve housing stability; and 2) increase public policy changes and direct services that positively impact low-income individuals and families.

### **Result: People can lead healthy lives.**

The foundation's strategies are to: 1) improve nutrition and healthy food access and increase opportunities for physical activity; and 2) improve access to care for vulnerable populations.

## Fields of Interest

### Subjects

- Aging, centers/services
- Animal welfare
- Arts
- Arts, artist's services
- Community/economic development
- Disasters, preparedness/services
- Education
- Education, drop-out prevention
- Education, reading
- Environment
- Environment, beautification programs
- Environment, toxics
- Family services
- Family services, adolescent parents
- Family services, parent education
- Foundations (community)
- Health care
- Higher education
- Housing/shelter, development
- Human services
- Human services, emergency aid
- Libraries/library science
- Neighborhood centers
- Nonprofit management

- Public affairs
- Recreation, parks/playgrounds
- Reproductive health, prenatal care
- Substance abuse, prevention
- Youth development, services

### Population Groups

- Economically disadvantaged

### Geographic Focus

- Alabama

### Types of Support

- Building/renovation
- Capital campaigns
- Curriculum development
- Equipment
- Matching/challenge support
- Program development
- Publication
- Seed money

### Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Newsletter
- Occasional report

### Application Information

The foundation uses a results-based approach to grantmaking with a focus on four results most important to the community's well-being and identified by data and community input. The Results Framework includes four results, each with targeted strategies and objectives, as well as separate RFPs and application guidelines. Full proposals are accepted by invitation only based on brief proposals; visit foundation web site for complete application information.

Application form required.

Initial approach: Complete online brief proposal

Board meeting date(s): Quarterly

Deadline(s): January date for brief proposals and March date for full proposals for Cycle 1; July date for brief proposals and September date for full proposals for Cycle 2

Final notification: February date for full proposal invitations and May for grant determination for Cycle 1; August date for full proposal invitations and Dec. for grant determination for Cycle 2

Additional information: Cycle 1 accepts proposals targeting the following results: 1) Children are successful along the education pipelines, 2) People can lead healthy lives. Cycle 2 accepts proposals targeting the following results: 1) Communities are sustainable, livable and vibrant, and 2) Individuals and families are economically secure.

### Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert Holmes, Jr. \*, Chair.
- Kate Nielsen, Pres.  
Affiliation(s):  
*Cultural Alliance of Greater Birmingham, Board Member*  
*Nonprofit Resource Center of Alabama, Board Member*  
*Alabama Giving, Board Member*  
*Regions Charity Classic Foundation, Board Member*
- Marguerite Johnson, Sr. V.P., Grants and Initiatives
- Kathryn Corey, V.P., Donor Rels.
- James McCrary, V.P., Grants and Evaluation
- Erin Kendrick Stephenson, V.P., Devel.
- Wendy Rodde, C.F.O.  
Affiliation(s):  
*Randolph-Mason, Alumnae Board Member*



*Junior League of Birmingham, Member*

- Neal R. Berte
- H. Corbin Day
- John Alex Floyd, Jr.
- Gillian White Goodrich
- Jay Grinney
- Kathryn D. Harbert
- Ronne M. Hess
- Michael D. Luce
- Carl E. Miller, III
- Kathryn Miree

*Affiliation(s):*

*Cultural Alliance of Greater Birmingham, Board Member*

*Nonprofit Resource Center of Alabama, Board Member*

*Alabama Giving, Board Member*

*Regions Charity Classic Foundation, Board Member*

- G. Ruffner Page, Jr.
- Yolanda N. Sullivan
- Larry D. Thornton, Sr.
- Ray Watts
- Lloyd R. Wilson
- Denise "Dee" A. Woodham
- Cameron M. Vowell, Ph.D.

## **Trustee Banks**

- Canterbury Trust Company
- Compass Bank
- CB&T
- National Bank of Commerce
- Regions Bank
- The Trust Co. of Sterne, Agee and Leach
- Wachovia Bank, N.A.

## **Staff**

### **Number of Staff**

10 full-time professional

2 part-time professional

4 full-time support

1 part-time support

### **Key Staff**

*Note: Does not include officers.*

- JohnQueta Bailey, Grants Admin.
- Anne Bethea, Dir., Gift Planning
- Liz Bolen, Acctg. Mgr.
- Madeline Harris, Dir., Women's Breast Health Fund
- Gus Heard-Hughes, Dir., Initiatives
- Brenda K. Howell, Dir., Ops. and Compliance
- Koko McCall, Prog. Off.
- Kim Rogers, Prog. Off.
- Lora Terry, Donor Rels. Mgr.
- Rita Thomas, Office Mgr. & Admin. Asst.
- Sheree Wilkerson, Scholarship Mgr.

## **Memberships**

### **Regional Associations of Grantmakers**

- Alabama Giving

### **Affinity Groups**

- Grantmakers for Effective Organizations
- Mission Investors Exchange

### **Associations and Other Philanthropic Organizations**

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$169,336,538 (market value)

Gifts received: \$23,947,276

Expenditures: \$20,058,050

Total giving: \$17,706,427

Qualifying distributions: \$18,624,990

Giving activities include:

\$17,384,477 for 279 grants (high: \$5,585,022

\$317,950 for 99 grants to individuals

## Online Communications

- [LinkedIn](#)
- [RSS Feed](#)
- [YouTube](#)
- [Twitter](#)
- [Community Foundation of Greater Birmingham's Philanthropy Promise](#)
- [Blog](#)
- [Facebook](#)

## Additional Location Information

County: Jefferson

Metropolitan area: Birmingham-Hoover, AL

Congressional district: Alabama District 07

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## MetLife Foundation

**Last Updated:** 2014-05-14

### At A Glance

1095 Ave. of the Americas

New York, NY United States 10036-6797

Telephone: (212) 578-6272

Contact: A. Dennis White, C.E.O. and Pres.

Fax: (212) 578-0617

E-mail: [metlifefoundation@metlife.com](mailto:metlifefoundation@metlife.com)

URL: [www.metlife.com/metlife-foundation](http://www.metlife.com/metlife-foundation)

### Type of Grantmaker

Company-sponsored foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$168,418,066

Total giving: \$41,107,662

## EIN

132878224

## 990

[2012](#) [2011](#) [2010](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2000](#)

## Background

Incorporated in 1976 in NY.

## Limitations

Giving on a national and international basis, with emphasis in CA, CT, DC, FL, IL, MA, NJ, NY, PA, TX, Brazil, India, Latin America, Mexico, Peru, and South Korea.

No support for private foundations, religious, fraternal, athletic, political, or social organizations, hospitals, local chapters of national organizations, disease-specific organizations, labor groups, organizations primarily engaged in patient care or direct treatment, drug treatment centers, community health clinics, or elementary or secondary schools.

No grants to individuals (except for employee-related scholarships), or for endowments, courtesy advertising, or festival participation.

## **Purpose and Activities**

The foundation supports programs designed to empower communities and bring financial inclusion to low-income individuals and families. Special emphasis is directed toward programs designed to promote access to knowledge; access to services; and access to insights.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Access to Insights**

Through Access to Insights, the foundation shares knowledge from partners and communities to offer insights on community financial inclusion to enhance MetLife's approach and advance common goals. Special emphasis is directed toward thought leadership on the problems and potential solutions to financial inclusion; and increasing financial inclusion through measurement and evaluation.

### **Access to Knowledge**

The foundation supports programs designed to reach large numbers of low-income households; and foster financial strategies and resources that empower communities to realize their dreams. Special emphasis is directed toward programs designed to remove barriers to entry to the benefits of the financial sector; identity entry points to bring excluded people into the financial system; and increase the demand for high-quality, affordable financial services that can be delivered over the long-term to low-income clients.

### **Access to Services**

The foundation supports programs designed to develop services like savings, microfinance, and credit to low-income individuals in need and ensure they are prepared to improve the lives of their families and communities. Special emphasis is directed toward sustainable institutions delivering appropriate products to low- and moderate-income people; personal financial management (PFM) tools and products that make it easier for people to make better decisions and deepen financial lives; and behavioral economics/social marketing to increase the likelihood of successful uptake and usage of affordable financial services.

### **Employee Matching Gifts**

The foundation matches contributions made by full-time employees, directors, retirees, and spouses of employees of MetLife to institutions of higher education on a one-for-one basis from \$25 to \$5,000 per contributor, per year.

### **Employee Volunteer Programs**

Through Volunteer Ventures and the MetLife Volunteer Service Awards, the foundation provides grants to nonprofit organizations with which employees of MetLife volunteer.

### **Employee-Related Scholarships**

The foundation awards college scholarships to children of associates of MetLife. The program is administered by the National Merit Scholarship Corp. and Scholarship America.

### **Social Investment Program**

The foundation provides loans and equity investments to organizations that do not meet customary investment criteria of private and institutional investors. Investments are made to projects designed to improve the quality of life for individuals and communities. Special emphasis is directed toward programs designed to promote community revitalization; economic development; and health.

## **Fields of Interest**

### **Subjects**

- Alzheimer's disease
- Alzheimer's disease research
- Arts
- Children/youth, services
- Community/economic development
- Education
- Education, services
- Family services
- Financial services
- Food banks
- Health care
- Higher education
- Housing/shelter
- Human services
- Human services, financial counseling
- Leadership development
- Media, television
- Microfinance/microlending
- Museums (art)
- Public affairs

- Public health
- Social entrepreneurship
- Urban/community development
- Youth development
- Youth development, adult & child programs
- Youth development, business

### **Population Groups**

- Adults
- African Americans/Blacks
- Aging
- Asians/Pacific Islanders
- Boys
- Disabilities, people with
- Economically disadvantaged
- Girls
- Hispanics/Latinos
- Homeless
- LGBTQ
- Men
- Military/veterans
- Minorities
- Native Americans/American Indians
- Physically disabled
- Women
- Young adults, female
- Young adults, male

### **Geographic Focus**

- National, International
- California
- District of Columbia
- Illinois
- Massachusetts
- New York
- Pennsylvania

### **Types of Support**

- Continuing support
- Employee matching gifts
- Employee volunteer services
- Employee-related scholarships
- General/operating support
- In-kind gifts
- Management development/capacity building
- Program development
- Program evaluation
- Program-related investments/loans
- Publication
- Research
- Scholarship funds

### **Publications**

- Annual report (including application guidelines)
- Corporate giving report (including application guidelines)
- Financial statement

### **Application Information**

Grant requests outside of the financial inclusion priority area are by invitation only.

Application form required.

Applicants should submit the following:

1. Name, address and phone number of organization
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. Listing of board of directors, trustees, officers and other key people and their affiliations

5. Detailed description of project and amount of funding requested
6. Contact person
7. Copy of current year's organizational budget and/or project budget
8. Additional materials/documentation

Initial approach: Complete online eligibility quiz and application for financial inclusion requests

Copies of proposal: 1

Deadline(s): None for financial inclusion grants

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Metropolitan Life Insurance Co.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Michael Zarcone \*, Chair.
- A. Dennis White \*, C.E.O. and Pres.
- Phyllis Zanghi, Counsel and Secy.
- Jonathan Rosenthal \*, Treas.
- Robert C. Tarnok, Cont.
- Frans Hijkoop
- Michel Khalaf
- Maria R. Morris
- Oscar Schmidt
- Eric Steigerwalt
- Christopher Townsend

## Staff

### Key Staff

*Note: Does not include officers.*

- Eric Goldberg, Dir., Corporate Social Responsibility
- April Hawkins, Dir., Program and Special Projects
- Mavel Jones, Mgr., MetLife Employee Engagement

## Memberships

### Regional Associations of Grantmakers

- Philanthropy New York

### Affinity Groups

- Grantmakers in Aging
- Grantmakers In Health
- Grantmakers In the Arts
- The Committee Encouraging Corporate Philanthropy

### Associations and Other Philanthropic Organizations

- Council on Foundations
- GuideStar USA
- Independent Sector

## Financial Data

Year ended 2012-12-31

Assets: \$168,418,066 (market value)

Gifts received: \$47,500,000

Expenditures: \$41,832,441

Total giving: \$41,107,662

Qualifying distributions: \$42,634,812

Giving activities include:

\$39,232,310 for 311 grants (high: \$1,000,000)

\$875,352 for 1364 employee matching gifts

\$3,512,691 for loans/program-related investments

Estimated financial data for year ending 2012-12-31:

Assets: \$178,992,809

Grants: \$42,488,850

## Online Communications

- [MetLife Foundation Video Gallery](#)

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 10

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$600,000 to Trust for Public Land, San Francisco, CA, in 2012. For More Parks for More People
- \$410,000 to National Association of Secondary School Principals, Reston, VA, in 2012. For NASSP Breakthrough Schools Program
- \$250,000 to Generations United, Washington, DC, in 2012. For Stronger Together: Developing Youth Intergenerational Entrepreneurs and Recognizing Excellence in Intergenerational Communities
- \$250,000 to Childrens Health Fund, New York, NY, in 2012. For Healthy Kids, Healthy Smiles Initiative
- \$200,000 to Partners for Livable Communities, Washington, DC, in 2012. For MetLife Foundation City Leaders Institute for Aging in Place
- \$200,000 to Reach Out and Read, Boston, MA, in 2012. For Supporting Military Families
- \$125,000 to Smithsonian Institution, Washington, DC, in 2012. For Smithsonian Community Grant Program
- \$100,000 to Smithsonian Institution, Washington, DC, in 2012. For Black Wings: American Dreams of Flight
- \$50,000 to Partners for Livable Communities, Washington, DC, in 2012. For Institutions as Fulcrums of Change: Creative Re-imagining of Community Assets to Meet the Challenges of the Next Decade
- \$50,000 to Fifth Avenue Committee, Brooklyn, NY, in 2012. For Affordable Housing, Workforce and Economic Development in South Brooklyn
- \$50,000 to Studio in a School Association, New York, NY, in 2012. For Art and Healthy Living
- \$2,000 to Ronald McDonald House of Delaware, Wilmington, DE, in 2012. For Volunteer Project Fund - Ronald McDonald House of Delaware Meal Program

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## Vermont Community Foundation

**Last Updated:** 2014-07-09

### At A Glance

3 Court St.

Middlebury, VT United States 05753

Telephone: (802) 388-3355

Contact: For questions about grants: Jen Peterson, V.P., Program and Grants; For questions about accounting and finance: Debra Rooney, V.P., Finance and C.F.O.; For media inquiries or questions about publications: Felipe Rivera, V.P., Communications

Fax: (802) 388-3398

E-mail: [info@vermontcf.org](mailto:info@vermontcf.org)

URL: [www.vermontcf.org](http://www.vermontcf.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$167,245,557

Total giving: \$12,603,915

### EIN

222712160

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Background

Established in 1986 in VT.

The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic

engagement.

## **Limitations**

Giving limited to VT.

No support for religious purposes.

No grants for capital campaigns, continuing support, debt reduction, or general endowments.

## **Purpose and Activities**

To build philanthropy in order to sustain healthy and vital Vermont communities.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Concert Artists Fund**

These grants support organizations that present performances of classical music in Chittenden County. Funds are limited to the support of public performances and cannot support music education or other programs. Grants up to \$10,000 are available.

### **Green Mountain Fund**

The Green Mountain Fund's areas of interest include: children, elderly and family services, education, environment, sustainability, and the arts. The Fund is interested in opportunities where a modest grant will have impact by leveraging a new idea or other dollars, or by making possible something that will benefit the children and families in the grantmaking region. The Fund supports projects in Lamoille County and the neighboring communities of Craftsbury, Greensboro, and Hardwick.

### **Hills and Hollows Fund**

Through its grant programs, the Hills and Hollows Fund aims to promote sustainable, healthy, vital and democratic communities. Grant funding is available to support existing services, provide seed money for promising new projects, and enable organizations outside of Poultney to expand their outreach to include area residents. Examples of eligible program areas include: 1) educational opportunities; 2) services for children, elderly, and family health; 3) food security; 4) community organizations that nurture, preserve and interpret the area's unique cultural, built and natural environment; 5) programs that address the use and abuse of limited natural resources, including responses to climate change; and 6) programs that encourage community engagement and a stronger sense of connection and belonging.

### **Innovations and Collaborations Grants Program**

Supports nonprofits that come up with new ways of working and reach across issue areas to collectively solve community problems. These \$10,000-\$20,000 grants provide support (in some cases multi-year support) projects that: 1) collaborate with other organizations across issues, sectors, or regions; 2) create a learning culture that strives for constant improvement and innovation; 3) work to understand and evaluate the impact of their work look at and address the root causes of issues or problems in Vermont; 4) engage their constituencies in ways that are new to their organizations; or 5) involve their constituents in direct decision-making and leadership roles.

### **Lake Champlain and Tributaries Restoration Fund**

Grants will be awarded for new initiatives, one-time special projects, or continuing funding for outstanding, existing programs that address one or more of the following purposes: 1) protect, restore and enhance the ecosystem integrity and ecological connectivity of the community of aquatic life in the Lake Champlain ecosystem and its tributaries; 2) protect, restore and enhance lake sturgeon and their habitats in the Lake Champlain basin and its tributaries 3) restore a self-sustaining land-locked Atlantic Salmon population in Lake Champlain through habitat restoration and fish monitoring programs; or 4) protect the riparian zones along Lake Champlain tributaries for the benefit of the ecological and recreational resources through the purchase of land easements.

### **Samara Fund**

The Samara Fund's mission is to help create a vibrant Vermont LGBTQ community and ensure that LGBTQ Vermonters are connected, healthy, appreciated, safe, and empowered. The fund can help: 1) individuals and families with who want to support LGBTQ causes both now and into the future and 2) nonprofit organizations that benefit the LGBTQ community by providing grants to help meet and sustain their missions.

### **Small and Inspiring Grants Program**

This program will fund projects that: 1) connect people to each other through volunteer work or community-building efforts; 2) connect people to the environment around them in new ways; or 3) bring people together and provide opportunities for positive social interaction and benefit. Grants will be in the range of \$500-\$2,500.

### **Special and Urgent Needs (SUN) Grants**

The foundation will consider any eligible organization that meets the overall grantmaking criteria of the foundation.

Organizations that are working to meet basic human needs (food, shelter, health) will be given priority. The foundation looks for proposals that will allow an organization to: 1) conduct emergency repairs of building structure or mechanical systems (heating/cooling, water service, etc.) whose sudden and unexpected failure interferes with the provision of services; 2) replace essential equipment and technology whose sudden and unexpected failure interferes with the provision of services; 3) provide resources whose need could not have been anticipated or budgeted, and without which the work of the organization would be severely hampered; or 4) manage an unanticipated leadership transition or emergency succession of an executive director.

## **Upper CT River Mitigation and Enhancement Fund**

The Mitigation and Enhancement Fund (MEF) provides financial assistance to projects, activities, and endeavors that will restore, protect, and/or enhance the river ecosystem affected by the 15-mile Falls hydroelectric project, or that will serve as mitigation for some of the impacts of the project.

## **Vermont Arts Endowment Fund**

The Vermont Arts Endowment Fund focuses its grantmaking on the creation and presentation of new work by Vermont artists and arts organizations. Individual artists are welcome to apply. Grants are typically made in the fields of dance; theater; music composition and performance; creative writing, including poetry, short stories, novels, and plays; sculpture; painting; photography; and film, although work in other media may also be eligible. Arts organizations presenting the work of Vermont artists are also eligible to apply. These organizations can include galleries, theater companies, choruses, musical ensembles, festivals, and presenting organizations. Grants up to \$5,000 are available.

## **Fields of Interest**

### **Subjects**

- Adult/continuing education
- AIDS
- Alcoholism
- Arts
- Child development, education
- Child development, services
- Children/youth, services
- Civil/human rights
- Community/economic development
- Economic development
- Education
- Education, early childhood education
- Elementary school/education
- Environment
- Environment, natural resources
- Family services
- Food services
- Health care
- Health organizations
- Higher education
- Historic preservation/historical societies
- Homeless, human services
- Housing/shelter
- Human services
- Humanities
- Libraries/library science
- Mental health/crisis services
- Minorities/immigrants, centers/services
- Public affairs
- Reproductive health, family planning
- Secondary school/education
- Substance abuse, services
- Youth, services

### **Geographic Focus**

- Vermont

### **Types of Support**

- Building/renovation
- Consulting services
- Curriculum development
- Emergency funds
- Equipment
- Film/video/radio
- General/operating support
- Grants to individuals
- Income development
- Management development/capacity building
- Mission-related investments/loans
- Program development
- Program evaluation
- Program-related investments/loans



- Publication
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Newsletter
- Occasional report

## Application Information

Visit foundation web site for application, additional guidelines per grant type, and specific deadlines.

Application form required.

Initial approach: Online application only

Board meeting date(s): 4 times annually

Deadline(s): Varies

Final notification: Varies

Additional information: Guidelines vary per grant type.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- A. Jay Kenlan \*, Chair.  
Affiliation(s):  
*Kenlan, Schwiebert, Facey and Goss, P.C., Attorney*
- Tim Volk \*, Vice-Chair.  
Affiliation(s):  
*Kelliher Samets Volk, Pres. and Partner*
- Stuart Comstock-Gay, C.E.O. and Pres.
- Patrick H. Berry, V.P., Philanthropy
- Jen Peterson, V.P., Progs. and Grants
- Felipe Rivera, V.P., Comms.
- Debbie Rooney, V.P., Finance and C.F.O.
- James G. Wheeler, Jr. \*, Secy.  
Affiliation(s):  
*Downs Rachlin Martin, PLLC, Attorney*
- Deb Brighton \*, Treas.
- Lisa Cashdan
- Staige Davis  
Affiliation(s):  
*Lang McLaughry Spera, C.E.O.*
- John Killacky  
Affiliation(s):  
*Flynn Center, Exec. Dir. and C.E.O.*
- Peter Kinder  
Affiliation(s):  
*KLD Research, Co-Founder and Former Pres.*
- Michael Metz  
Affiliation(s):  
*Michael Metz and Associates, Inc., Pres.*
- Julie Peterson  
Affiliation(s):  
*Southeast Vermont Learning Collaborative, Assoc. Dir.*
- Betsy Rathbun-Gunn
- Margaret Seely

## Staff

### Number of Staff

14 full-time professional

4 part-time professional

3 full-time support  
1 part-time support

## Key Staff

*Note: Does not include officers.*

- Lydia Brownell, Fund Mgr.
- Heather Carlton, Acct.
- Katie Grauer, Philanthropy Assoc.
- Kim Haigis, Administrative Coord., Progs. and Grants
- Maria Hoaglund, HR and Finance Assoc.
- Christopher Kaufman Ilstrup, Philanthropic Advisor
- Emily Jacke, Community Philanthropy Assoc.
- Laurie Lowy, Acct.
- Janet Malcolm, Grants Assoc.
- Janet McLaughlin, Special Projects Dir.
- David Morrissey, Acctg. Mgr.
- Paige Pierson, Comms. Mgr.
- Tom Roberts, Sr. Philanthropic Advisor
- Richard Ruane, Inf. Systems Mgr.
- Meg Smith, Dir., Women's Fund
- Stephanie Tuxill, Grants Assoc.
- Carolyn Weir, Special Projects Advisor

## Memberships

### Affinity Groups

- Mission Investors Exchange
- The Forum for Sustainable and Responsible Investment (US SIF)

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$167,245,557 (market value)

Gifts received: \$16,537,381

Expenditures: \$16,608,412

Total giving: \$12,603,915

Qualifying distributions: \$14,508,025

Giving activities include:

\$12,603,915 for grants

## Online Communications

- [Philanthropy's Promise](#)
- [RSS Feed](#)
- [Twitter](#)
- [Facebook](#)
- [President's Blog: What's Stu-ing?](#)
- [LinkedIn](#)
- [YouTube](#)

## Additional Location Information

County: Addison

Congressional district: Vermont District At-large

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$197,754 to Vermont Land Trust, Montpelier, VT, in 2012. For the operation of the Vermont Land Trust's Conservation Stewardship Program, a program which monitors and enforces perpetual conservation easements on properties throughout Vermont
- \$190,000 to TechFoundation, Cambridge, MA, in 2012. For where it's needed most
- \$150,000 to Vermont Community Loan Fund, Montpelier, VT, in 2012. To fund the Vermont Birth to Three (VB3) small grants program
- \$150,000 to Highfields Institute, Hardwick, VT, in 2012. For the work of Highfields Center for Composting in establishing statewide food scrap recycling through its Close the Loop! Vermont program
- \$135,000 to Southwest Vermont Supervisory Union, Bennington, VT, in 2012. For VCPC (Vermont Community

- Preschool Collaborative) implementation grant for Bennington to serve at least 98 pre-K children
- \$125,000 to Pro Publica, New York, NY, in 2012. For general support
  - \$53,740 to Vermont Youth Conservation Corps, Richmond, VT, in 2012. For Irene Recovery Work
  - \$5,000 to Connecticut River Watershed Council, Greenfield, MA, in 2012. For completing a video and supporting material related to the floodplain of the Otter Creek (co-partner w/Connecticut River Watershed Council)
  - \$2,600 to Middlebury College, Middlebury, VT, in 2012. For Donation to support the Middlebury College Womens Golf Team
  - \$2,250 to Bryan Memorial Gallery Foundation, Jeffersonville, VT, in 2012. For \$1,000 for the Alden Bryan Memorial Award for Best in Show (with medal), \$750 for second prize, and \$500 for third prize - Land and Light Summer Show
- 

## Lloyd A. Fry Foundation

**Last Updated:** 2014-05-15

### At A Glance

120 S. LaSalle St., Ste. 1950  
Chicago, IL United States 60603-3419  
Telephone: (312) 580-0310  
Contact: Unmi Song, Pres. and Secy.  
Fax: (312) 580-0980  
E-mail: [usong@fryfoundation.org](mailto:usong@fryfoundation.org)  
URL: [www.fryfoundation.org](http://www.fryfoundation.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Celebrity: Business

### Financial Data

(yr. ended 2013-06-30)  
Assets: \$164,492,986  
Total giving: \$7,389,379

### EIN

366108775

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Established in 1959 in IL.

Founded by the late Lloyd A. Fry, who established the Lloyd A. Fry Roofing Company in Chicago in 1933. The company grew to eventually become the world's largest producer of asphalt roofing products with more than 50 asphalt refineries and roofing plants across the country.

### Limitations

Giving generally limited to Chicago, IL.

No support for medical research, religious purposes, governmental bodies, or tax-supported educational institutions for services that fall within their responsibilities.

No grants to individuals, or for general operating support for new grantees, annual campaigns, emergency funds, deficit financing, building funds, fundraising benefits, land acquisition, renovation projects, or endowment funds; no loans.

### Purpose and Activities

The foundation supports organizations with the strength and commitment to address persistent problems of urban Chicago resulting from poverty, violence, ignorance and despair. The foundation seeks to build the capacity of individuals and the systems that serve them. The vision is of a Chicago that offers education, prosperity and hope for all.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Arts Education Program

Focus is on programs for low-income Chicago children and youth that use the arts as a means to improve learning and provide life-enriching experiences. The foundation is interested in efforts to improve the quality and expand the availability of arts

education programs, especially in Chicago public schools. The foundation considers support for arts education for students and professional development for arts educators. Priority is given to arts education programs that provide a combination of arts instruction, performance or exhibition experience, and interaction with professional artists and arts educators. The foundation is also interested in proposals to convene experts to share information, facilitate discussion with arts educators, and help shape and strengthen arts education in Chicago public schools. The foundation is also interested in teacher-training programs that immerse educators in the practice and study of the arts and present teachers with innovative strategies for teaching the arts, engaging students in the creative process, and assessing student progress.

## **Education**

Interest in education relates to improving public education and expanding opportunities for inner-city youth in Chicago. Teacher professional development, school leadership development, academic enrichment, and college preparation are among the activities they support. The foundation also considers grant requests for policy advocacy where the connection to academic achievement is clear. Priority is given to programs that measure improvements to academic achievement, instructional quality, or college enrollment rates. Proposals that enhance the quality of programs are also welcomed. Generally, unsolicited proposals from individual schools are not considered. More information is available on the foundation website.

## **Employment Program**

The Employment Program addresses the foundation's commitment to helping families and individuals move out of poverty. The program supports employment programs that help low-income individuals build the knowledge and skills necessary to find and keep jobs. The foundation is particularly interested in programs that help individuals improve their potential to advance to living-wage jobs and careers. Grants are made to projects that focus on: employment-related literacy and English as a Second Language; employment assistance programs that offer pre-employment, job placement and job retention services; and vocational training connected to growing industries. The foundation encourages proposals for efforts to build the capacity of organizations to deliver high-quality employment services. The foundation also welcomes proposals for policy advocacy efforts to improve the quality of education and training programs and to increase access to education and training for low-income adults.

## **Health**

Focus is on improving access to quality care for Chicago's low-income residents. Provides support for primary health care services, community health outreach activities, advocacy, and prevention-based health education programming to Chicago's underserved neighborhoods and communities. Priority is given to research-based initiatives that incorporate health education, early disease detection, and treatment interventions for chronic diseases (such as asthma, diabetes, HIV/AIDS and hypertension); enroll families into government-subsidized health insurance programs (such as All Kids, Family Care, Medicaid and Medicare); include strategic partnerships between a health system and community-based organizations; focus on linguistically and culturally competent programs for limited-English speaking immigrants; and improve knowledge and practice in the health field. The foundation will consider programs operated by non-profit community service organizations, community health centers, hospitals, and policy advocacy organizations. Programs must demonstrate the ability to measure improvements in access to care and health status within an accessible, culturally and linguistically competent environment.

## **Fields of Interest**

### **Subjects**

- AIDS
- Arts
- Education
- Elementary school/education
- Employment
- Health care
- Minorities/immigrants, centers/services
- Secondary school/education

### **Population Groups**

- Adults
- Adults, men
- Adults, women
- African Americans/Blacks
- AIDS, people with
- Asians/Pacific Islanders
- Boys
- Children
- Children/youth
- Economically disadvantaged
- Girls
- Hispanics/Latinos
- Immigrants/refugees
- Men
- Minorities
- Women

- Young adults
- Young adults, female
- Young adults, male

## Geographic Focus

- Illinois

## Types of Support

- Continuing support
- Curriculum development
- General/operating support
- Program development
- Program evaluation
- Technical assistance

## Publications

- Application guidelines
- Annual report (including application guidelines)
- Financial statement
- Grants list

## Application Information

Organizations outside of Chicago, IL are rarely funded. The foundation now requires demographic information from applicant organizations. Chicago Area Grant Application Form accepted.

Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Statement of problem project will address
3. Results expected from proposed grant
4. Qualifications of key personnel
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Listing of additional sources and amount of support
7. How project's results will be evaluated or measured
8. Detailed description of project and amount of funding requested
9. Copy of most recent annual report/audited financial statement/990
10. Brief history of organization and description of its mission
11. Copy of current year's organizational budget and/or project budget

Initial approach: Letter of inquiry

Copies of proposal: 1

Board meeting date(s): Feb., May, Aug., and Nov.

Deadline(s): Mar. 1, June 1, Sept. 1, and Dec. 1

Final notification: 3 months

Additional information: Letter should include brief statement of proposed project and project budget. Full proposals should contain the above elements.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Lloyd A. Fry‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Howard M. McCue, III \*, Chair.  
Affiliation(s):  
*Washington Square Health Foundation, Inc., Legal Counsel*  
*Mayer Brown Rowe & Maw, Partner*
- Lloyd A. Fry, III \*, Vice-Chair.
- Unmi Song, Pres. and Secy.
- Stephanie Pace Marshall \*, V.P.
- Graham C. Grady, Treas.  
Affiliation(s):

*Bell, Boyd &  
Lloyd LLP, Partner*

- Diane Sotiros, Cont.
- Amina J. Dickerson  
Affiliation(s):  
*Woods Fund of Chicago, Board Member*  
*Women's Funding Network, Board Member*
- David A. Donovan

## Staff

### Number of Staff

5 full-time professional

2 full-time support

1 part-time support

### Key Staff

*Note: Does not include officers.*

- Oswaldo Alvarez, Prog. Off., Employment
- Soo Na, Sr. Prog. Off., Health
- Sarah Slavin, Prog. Off., Edu.

## Memberships

### Regional Associations of Grantmakers

- Donors Forum (IL)

### Affinity Groups

- Asian Americans/Pacific Islanders in Philanthropy
- Grantmakers Concerned with Immigrants and Refugees
- Grantmakers for Education
- Grantmakers In Health
- Grantmakers In the Arts

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Independent Sector

## Financial Data

Year ended 2013-06-30

Assets: \$164,492,986 (market value)

Expenditures: \$10,109,550

Total giving: \$7,389,379

Qualifying distributions: \$9,181,748

Giving activities include:

\$7,389,379 for 276 grants (high: \$150,000; low: \$200)

## Additional Location Information

County: Cook

Metropolitan area: Chicago-Naperville-Joliet, IL-IN-WI

Congressional district: Illinois District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$250,000 to Ingenuity Chicago, Chicago, IL, in 2012. For Ingenuity Incorporated to implement strategies to expand arts learning in Chicago
  - \$250,000 to Big Shoulders Fund, Chicago, IL, in 2012. For the Extended Day Program
  - \$160,000 to Community Renewal Society, Chicago, IL, in 2012. For Catalyst Chicago and the Chicago Reporter
  - \$120,000 to Women Employed Institute, Chicago, IL, in 2012. For Career Pathways and Student Support initiatives
  - \$80,000 to Lawndale Christian Health Center, Chicago, IL, in 2012. For the Medical Home Advancement Project
  - \$70,000 to Posse Foundation, Chicago, IL, in 2012. For the Pre-Collegiate Training Program
  - \$60,000 to Latino Union of Chicago, Chicago, IL, in 2012. For the Day Laborer Program at the Albany Park Workers Center
  - \$40,000 to Northeastern Illinois University, Chicago, IL, in 2012. For the Studio Thinking and American Art project
-

# McGregor Fund

**Last Updated:** 2014-07-22

## At A Glance

333 W. Fort St., Ste. 2090  
Detroit, MI United States 48226-3134  
Telephone: (313) 963-3495  
Contact: C. David Campbell, Pres.  
Fax: (313) 963-3512  
E-mail: [info@mcgregorfund.org](mailto:info@mcgregorfund.org)  
URL: [www.mcgregorfund.org](http://www.mcgregorfund.org)

## Type of Grantmaker

Independent foundation

## Financial Data

(yr. ended 2013-06-30)  
Assets: \$164,329,580  
Total giving: \$4,914,123

## EIN

380808800

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Incorporated in 1925 in MI.

In 1925, Tracy and Katherine McGregor decided to make sure their extensive financial resources would continue to be used for social, educational and charitable programs. In that year, they established the McGregor Fund. They continued to add to the Fund's resources until it was large enough to commence an active grant program. During 1931-1936, Tracy identified the Fund's primary grantmaking priorities. They included higher education, youth services, health care and science. Special grants were given for programs aiding transients and homeless, the chronically ill, and education programs benefiting African Americans. In addition to the Fund, Tracy and Katherine continued to give generously from their own personal accounts to local charities including the Detroit Community Fund and the McGregor Institute. After Tracy's death in 1936, Katherine continued to give major gifts to the Fund and local charities until her death in 1954. Since then, the Fund has continued to carry out the legacy of Tracy and Katherine McGregor.

## Limitations

Giving primarily in the metropolitan Detroit, MI, area, including Wayne, Oakland, and Macomb counties.

No support for disease-specific organizations (or their local affiliates)

No grants to individuals, or for scholarships directly, fellowships, travel, workshops, seminars, special events, film or video projects, or conferences; no loans.

## Purpose and Activities

A private foundation organized to relieve misfortune and improve the well-being of people. The foundation provides grants to support activities in human services, education, health care, arts and culture, and public benefit.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Arts and Culture

Support for selected arts and cultural organizations which contribute significantly to the well-being of residents of southeastern Michigan.

### Education

Support for the following three areas: 1) Support of Schools and Early Child Education - the fund will consider grant requests from independent schools, including ISACS-accredited schools, religious schools and charter schools located in Detroit or Wayne, Oakland or Macomb counties. In considering requests from independent schools, priority will be given to those that can demonstrate high levels of educational quality and a commitment to diversity within their student body, faculty and staff. The fund will also consider requests from public school districts, with priority given to the Detroit Public Schools. Finally, the fund will also consider requests from 501(c)(3) organizations other than schools in the tri-county area for projects; 2) Support of Private Liberal Arts Colleges in Michigan and Ohio - the fund provides a special program of competitive grants for private liberal arts colleges and liberal arts colleges within private universities in Michigan and Ohio. The program awards up to three

grants annually of \$250,000 each to the selected institutions. Grant decisions under this program are made once per year in the spring. Grant payments under this program are made as one-time distributions restricted to the purpose outlined by the institution in its application. Colleges or universities that receive a grant under the program are not eligible to reapply until the third year after receiving a grant. As a result the institution may use the grant over a period of up to three years; 3) Support of Local Institutions of Higher Education - the fund recognizes that local institutions of higher education play a valuable role in supporting the quality of life within our region. The fund considers grant requests from institutions offering baccalaureate or graduate degrees. Requests from community colleges and other institutions not offering a baccalaureate or graduate degree will not be considered. Local private liberal arts colleges and universities may also apply under the Program of Support for Private Liberal Arts Colleges and Universities in Michigan and Ohio. However, institutions that receive support under that program will not be eligible to re-apply under either program for three years from the year in which a grant is received.

### **Health Care**

Emphasis on improving access to primary medical care, mental health care and substance abuse treatment for indigent, low-income and other highly underserved populations, primarily within the City of Detroit. Support will be considered for community health centers, school-based clinics and other community based organizations.

### **Human Services**

Emphasis on activities in southeastern Michigan addressing emergency needs in housing, provision of food, clothing and other direct aid.

### **Matching Gifts Program**

The fund matches trustee and employee contributions to nonprofit organizations dollar-for-dollar.

### **Public Benefit**

Support for major civic improvement efforts within the region as well as for civic and community organizations whose activities contribute significantly to improving the quality of life for residents of southeastern Michigan and to strengthening the non-profit sector.

## **Fields of Interest**

### **Subjects**

- Arts
- Education
- Health organizations, association
- Higher education
- Human services
- Medical care, in-patient care
- Youth, services

### **Population Groups**

- Homeless

### **Geographic Focus**

- Michigan

### **Types of Support**

- Building/renovation
- Capital campaigns
- Continuing support
- Employee matching gifts
- Equipment
- General/operating support
- Program development
- Seed money

### **Publications**

- Application guidelines
- Annual report (including application guidelines)
- Grants list

## **Application Information**

Grantmaking guidelines and application procedures are available on the foundation's Web site. Potential applicants are encouraged to contact the foundation to discuss proposed projects before submitting a proposal. Organizations are limited to submitting one grant application per year.

Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project



2. How project will be sustained once grantmaker support is completed
3. Signature and title of chief executive officer
4. Results expected from proposed grant
5. Qualifications of key personnel
6. Statement of problem project will address
7. Name, address and phone number of organization
8. Copy of IRS Determination Letter
9. Geographic area to be served
10. Copy of most recent annual report/audited financial statement/990
11. How project's results will be evaluated or measured
12. Listing of board of directors, trustees, officers and other key people and their affiliations
13. Detailed description of project and amount of funding requested
14. Plans for cooperation with other organizations, if any
15. Contact person
16. Copy of current year's organizational budget and/or project budget
17. Listing of additional sources and amount of support

Initial approach: Cover letter and proposal

Copies of proposal: 1

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): Applicants are encouraged to submit proposals at least 3 months in advance of board meetings

Final notification: 90 to 120 days

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Tracy W. McGregor‡
- Katherine W. McGregor‡

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- James B. Nicholson \*, Chair.  
Affiliation(s):  
*PVS Chemicals, Inc., C.E.O. and Pres.*  
*Detroit Symphony Orchestra, Chair.*  
*Amerisure Mutual Insurance Company, Chair.*  
*Community Foundation for Southeastern Michigan, Tr.*  
*Detroit Public Television, Board Member*  
*Business Leaders for Michigan, Board Member*  
*The Nature Conservancy, Board Member*  
*YMCA of Metropolitan Detroit, Board Member*
- Denise J. Lewis \*, Vice-Chair.  
Affiliation(s):  
*Honigman Miller Schwartz and Cohn LLP, Partner*  
*Sinai-Grace Hospital, Board Member*  
*Detroit Zoological Society, Board Member*  
*Next Detroit Neighborhood Initiative, Board Member*  
*Detroit Investment Fund, Investment Committee*  
*Detroit Riverfront Conservancy, Member, Finance Committee*  
*Wayne State University, Governor Emeritus*
- Norah M. O'Brien, C.F.O.
- Kate Levin Markel, C.O.O.
- William W. Sheldon, Jr. \*, Treas.  
Affiliation(s):  
*Elizabeth, Allan and Warren Sheldon Fund, Pres. and Treas.*  
*Community Foundation for Southeast Michigan, Board Member*  
*Detroit Institute of Arts, Board Member*  
*University Liggett School, Board Member*
- Dave Bing, Tr. Emeritus
- Ira J. Jaffe, Tr. Emeritus  
Affiliation(s):  
*Jaffe Raitt Heuer & Weiss PC, Partner*  
*The Crawford Group, Pres.*  
*Real Estate Development &*

*Investment Co., Inc., Pres.*

*Massachusetts Institute of Technology, Member, Corp. Development Comm.*

*Cranbrook Educational Community, Vice-Chair. and Tr.*

*The Parade Foundation, Tr.*

*Norman and Esther Allan Foundation, Pres. and Treas.*

*Crowford Family Foundation, Secy.*

*Erb Foundation, Chair.*

*The Michael F. McMamus Foundation, Tr.*

- Eugene A. Miller, Tr. Emeritus

Affiliation(s):

*Community Foundation for Southeastern Michigan, Tr.*

- Bruce W. Steinhauer, M.D. \*, Tr. Emeritus

- Peter P. Thurber, Tr. Emeritus

- Gerard M. Anderson

Affiliation(s):

*DTE Energy, C.E.O. and Pres.*

*The Nature Conservancy of Michigan, Board Member*

*The Greenways Initiative, Board Member*

*The Parade Company, Board Member*

- Cynthia N. Ford

Affiliation(s):

*University Liggett School, Pres.*

*Michigan Education Trust, Dir.*

*Belle Isle Conservancy, Board Member*

*Detroit Riverfront Conservancy, Board Member*

*Detroit Zoological Institute, Board Member*

*Children's Hospital of Michigan, Board Member*

*Children's Hospital of Michigan Foundation, Board Member*

*Cornerstone Schools Association, Partner*

*JDRF International, Director*

*Women's Forum, Member*

- Reuben A. Munday

Affiliation(s):

*Lewis &*

*Munday Law Firm, Chair.*

*Detroit Regional Chamber of Commerce, Board Member*

*Detroit Institute of the Arts, Board Member*

*Detroit Economic Growth Corporation, Board Member*

*Michigan Roundtable for Diversity and Inclusion, Board Member*

- Richard L. Rogers

Affiliation(s):

*College for Creative Studies, Pres.*

*Henry Ford Academy, Chair., Creative Urban Education, Inc.*

*New Detroit, Tr.*

- Susan Schooley, M.D.

Affiliation(s):

*Detroit Region of Henry Ford Medical Group, Medical Dir.*

*Henry Ford Health System, Chair., Dept. of Family Medicine*

*The Cabrini Clinic, Medical Dir.*

## **Staff**

### **Number of Staff**

4 full-time professional

1 full-time support

### **Key Staff**

*Note: Does not include officers.*

- LeAnda N. Hicks, Admin. Asst.
- TeQuion Brookins, Finance Assoc.

## **Memberships**

### **Regional Associations of Grantmakers**

- Council of Michigan Foundations

### **Affinity Groups**

- Funders Together to End Homelessness
- Mission Investors Exchange

#### **Associations and Other Philanthropic Organizations**

- Council on Foundations
- Independent Sector
- Michigan Nonprofit Association

#### **Financial Data**

Year ended 2013-06-30

Assets: \$164,329,580 (market value)

Expenditures: \$7,251,104

Total giving: \$4,914,123

Qualifying distributions: \$5,822,884

Giving activities include:

\$4,638,800 for 63 grants (high: \$300,000; low: \$300)

\$275,323 for 87 employee matching gifts

#### **Additional Location Information**

County: Wayne

Metropolitan area: Detroit-Warren-Livonia, MI

Congressional district: Michigan District 14

#### **Selected Grants**

The following grants are a representative sample of this grantmaker's funding activity:

- \$500,000 to Neighborhood Service Organization, Detroit, MI, in 2012. For the development and start-up operation of the Bell Building
- \$350,000 to Forgotten Harvest, Oak Park, MI, in 2012. For the Integrated Capacity Expansion
- \$300,000 to Michigan Future, Ann Arbor, MI, in 2012. For the Metro Detroit High School Accelerator Project
- \$300,000 to Detroit Symphony Orchestra, Detroit, MI, in 2012. For general operations
- \$300,000 to Detroit Institute of Arts, Detroit, MI, in 2012. For general operations
- \$260,000 to Turning Point, Mount Clemens, MI, in 2012. For \$325,000 for the capital campaign to build a new emergency shelter and \$120,000 for general operations
- \$100,000 to Greening of Detroit, Detroit, MI, in 2012. For the expansion of its urban agriculture work
- \$75,000 to Arab Community Center for Economic and Social Services, Dearborn, MI, in 2012. For annual operations of the Emergency Services Department
- \$60,000 to Sphinx Organization, Detroit, MI, in 2012. For Detroit-area educational programs for youth
- \$15,000 to Detroit Public Schools Foundation, Detroit, MI, in 2012. For Mumford High School

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## **Community Foundation Sonoma County**

**Last Updated:** 2014-01-13

#### **At A Glance**

(formerly The Sonoma County Community Foundation)

250 D St., Ste. 205

Santa Rosa, CA United States 95404-4773

Telephone: (707) 579-4073

Contact: For grants: Robert Judd, V.P., Progs.

Fax: (707) 579-4801

E-mail: [info@sonomacf.org](mailto:info@sonomacf.org)

URL: [www.sonomacf.org](http://www.sonomacf.org)

#### **Type of Grantmaker**

Community foundation

#### **Financial Data**

(yr. ended 2012-12-31)

Assets: \$153,516,532

Total giving: \$9,973,500

#### **EIN**

680003212

## Additional Contact Information

Grant inquiry e-mail: [rjudd@sonomacf.org](mailto:rjudd@sonomacf.org)

## Background

Incorporated in 1983 in CA.

## Limitations

Giving limited to Sonoma County, CA.

No support for religious purposes or advocacy activities, or primary or secondary schools or their academic foundations.

No grants to individuals (except for academic scholarships), or for fundraising events, annual fund campaigns, capital campaigns, conferences, or debt retirement; no loans (except program-related investments).

## Purpose and Activities

The Community Foundation Sonoma County connects people, ideas and resources to benefit the lives of those who live here. The foundation fulfills this mission by: 1) making grants to respond to important needs in Sonoma County and beyond; 2) encouraging donors to partner with us in fulfilling their financial and charitable goals; 3) ensuring that gifts made to the Community Foundation grow and have lasting impact; 4) convening people to work on relevant community challenges and issues; 5) providing community knowledge about Sonoma County; and 6) catalyzing community involvement and philanthropic commitment to improve the quality of life in Sonoma County.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Connecting a New Generation to a Better Future

A community prospers when it shares and acts on a sense of hope for its future. The foundation believes that the possibility of achieving one's life goals should be accessible to all. Scholarships are available through a new program, Scholarship Sonoma County, which is a partnership of the Community Foundation and 10,000 Degrees.

### Connecting Human Communities to Nature's Gifts

The physical beauty and biological diversity of Sonoma County are remarkable gifts of nature. The foundation believes that understanding the links connecting human and natural communities is vital to preserving the well-being of both. Grant programs include Environmental Education.

### Connecting People to Community Resources

Community well-being grows when everyone can participate both as a contributor and a beneficiary. The foundation commits to reducing the barriers to accessing community resources due to a person's income, ethnicity or other demographic characteristics. Grant programs include Basic Human Needs and Neighborhood Grants.

### Connecting to Community's Creativity and Cultures

The arts stretch imaginations, enliven a sense of purpose and animate connection to community. The foundation is committed to supporting the arts as a necessary means of sustaining the common good. Grant programs include: Arts Education, Artist Support and Expanding Engagement.

## Fields of Interest

### Subjects

- Arts
- Arts, artist's services
- Children/youth, services
- Community/economic development
- Education
- Environment
- Environmental education
- Health care
- Homeless, human services
- Housing/shelter
- Housing/shelter, temporary shelter
- Human services
- Humanities
- Women, centers/services

### Population Groups

- Children/youth

## Geographic Focus

- California

## Types of Support

- Consulting services
- Continuing support
- Emergency funds
- Endowments
- General/operating support
- Matching/challenge support
- Program development
- Program evaluation
- Program-related investments/loans
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Informational brochure
- Newsletter

## Application Information

Visit foundation web site for application forms, guidelines, and specific deadlines.

Application form required.

Initial approach: Telephone

Board meeting date(s): 1st Tues. of most months

Deadline(s): Varies

Final notification: Varies

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Harriet Derwingson \*, Chair.
- Elizabeth Brown, C.E.O. and Pres.
- Robert Judd, V.P., Progs.
- J. Mullineaux, V.P., Philanthropic Planning
- Herb Castillo \*, Secy.
- Kent Wigton, C.F.O.
- Linda Kachiu \*, Treas.  
Affiliation(s):  
*Zainer Rinehart Clarke DFK, Dir.*
- Lynda Desloges, Cont.
- Jean Schulz, Dir. Emeritus  
Affiliation(s):  
*Charles M. Schulz Museum & Research Center, Pres.*
- Jay Abbe
- Oscar Chavez  
Affiliation(s):  
*Community Action Partnership, Exec. Dir.*
- Dianne Edwards
- Theodore L. Eliot, Jr.
- Patrick Emery  
Affiliation(s):  
*Abbey, Weitzenberg, Warren and Emery, Member*
- Steve Goldberg  
Affiliation(s):  
*Friedemann, Goldberg LLP, Attorney at Law*
- Pete Golis

- Whitney Hall
- Katie Jackson  
Affiliation(s):  
*Jackson Family Wines, Member*
- Deberah B. Kelley  
Affiliation(s):  
*Exchange Bank Wealth Management, Member*
- Andrea Learned  
Affiliation(s):  
*St. Joseph Health Systems, Sonoma County, V.P., Devel.*
- Steve Rabinowtish  
Affiliation(s):  
*Santa Rosa Junior College, Professor, Political Science*
- Lew Reid  
Affiliation(s):  
*The California Endowment, Dir.*
- Marlene Soiland  
Affiliation(s):  
*Soiland Management Company, Member*
- David Voss  
Affiliation(s):  
*Exchange Bank, Exec. V.P.*
- Barry Weitzenberg
- Jody Withee
- Joan C. Woodard  
Affiliation(s):  
*Simons & Woodard, Inc., C.E.O. & Pres.*
- Michelle Zygielbaum

## **Staff**

### **Number of Staff**

9 full-time professional

3 full-time support

1 part-time support

### **Key Staff**

*Note: Does not include officers.*

- Karin Demarest, Prog. Off., Arts and Education
- Carolyn Dunn, Devel. Coord.
- Mary Peterson, Devel. and Philanthropic Svcs. Off.
- Judy Ponts, Sr. Acct.
- Miguel Ruelas, Dir., Philanthropic Svcs.

## **Memberships**

### **Regional Associations of Grantmakers**

- League of California Community Foundations

### **Affinity Groups**

- Grantmakers for Effective Organizations

### **Associations and Other Philanthropic Organizations**

- Council on Foundations

## **Financial Data**

Year ended 2012-12-31

Assets: \$153,516,532 (market value)

Gifts received: \$969,213

Expenditures: \$13,275,815

Total giving: \$9,973,500

Qualifying distributions: \$11,139,997

Giving activities include:

\$9,973,500 for grants

## Online Communications

- [Facebook](#)
- [E-Newsletter](#)

## Additional Location Information

County: Sonoma

Metropolitan area: Santa Rosa-Petaluma, CA

Congressional district: California District 05

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$2,600,000 to Charles M. Schulz Museum and Research Center, Santa Rosa, CA, in 2012. For general operating support
- \$1,431,000 to Sonoma Academy, Santa Rosa, CA, in 2012. For general operating support and for Makerspace Tools
- \$664,711 to Redwood Empire Food Bank, Santa Rosa, CA, in 2012. For general operating support, the capital campaign, and to purchase additional fresh produce
- \$533,073 to Pepperwood Foundation, Santa Rosa, CA, in 2012. For general operating support and Natural Science Education/Research
- \$488,400 to Canine Companions for Independence, Santa Rosa, CA, in 2012. For general operating support
- \$476,300 to Committee on the Shelterless, Petaluma, CA, in 2012. For general operating support to serve the homeless
- \$134,000 to Santa Rosa Memorial Hospital Foundation, Santa Rosa, CA, in 2012. For a mobile dental van, emergency and trauma center capital campaign, and cardiac department
- \$26,600 to Centro Laboral de Graton, Graton, CA, in 2012. For general operating support and for the Graton Day Labor Center
- \$15,000 to Concord Historical Society, Concord, CA, in 2012. For ADA lift at Galindo house
- \$12,830 to Sonoma Valley Unified School District, Sonoma, CA, in 2012. For the 3rd Grade Reading Program and the Summer School Program of the Youth Initiative

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## Fairfield County Community Foundation, Inc.

**Last Updated:** 2014-01-02

### At A Glance

(also known as FCCF)

383 Main Ave.

Norwalk, CT United States 06851-1543

Telephone: (203) 750-3200

Contact: For grants: Sharon Jones, Prog. Admin. Asst.

Fax: (203) 750-3232

E-mail: [info@fccfoundation.org](mailto:info@fccfoundation.org)

URL: [www.fccfoundation.org](http://www.fccfoundation.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2012-06-30)

Assets: \$150,440,396

Total giving: \$16,628,149

### EIN

061083893

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

### Background

Established in 1992 in CT as a result of the merger of the Five Town Foundation, Danbury Community Endowment, Fairfield County Cooperative Foundation, Greenwich Foundation for Public Giving, and Stamford Foundation; merged with The Greater Bridgeport Area Foundation in 2008.

The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

## **Limitations**

Giving limited to the Fairfield County, CT, area from discretionary funds; giving throughout the U.S. from grants made from Donor-Advised funds.

No support for religious purposes, or for start-up or new nonprofit organizations, or for parochial, charter, or private schools.

No grants for endowments, building campaigns, deficit financing, fellowships, annual campaigns, or fundraising events.

## **Purpose and Activities**

The foundation promotes the growth of philanthropy by helping donors achieve their philanthropic goals. The foundation: 1) serves as a leader, catalyst and resource for philanthropy; 2) creates and manages charitable funds; and 3) identifies and addresses community needs through initiatives, partnerships and strategic grantmaking.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Arts and Culture**

Grants from competitive and field of interest funds are intended to assure the sustainability and excellence of these vital nonprofits in several ways, including general operating support, professional development and technical assistance, and collaborative or service programs.

### **Economic Opportunity**

Organizations may qualify for economic opportunity grants if you provide affordable housing, prepare students for college and employment, and foster upward mobility for low-income workers.

### **Education and Youth Development**

The foundation provides grants to organizations for education and youth development grants that work to close the achievement gap in Fairfield County and offer after-school and summer learning programs.

### **Environment**

The foundation supports numerous nonprofit programs through the Fund for the Environment and discretionary funds that are 1) growing the next generation of environmental stewards by supporting high-quality environmental education programs in Fairfield County; 2) protecting one of the region's most precious natural resources by improving the overall environmental health of the Long Island Sound and its watershed; 3) increasing the amount of green space in Bridgeport, Danbury, Norwalk and Stamford; 4) promoting smart growth initiatives; and 5) educating Fairfield County residents about policies that affect the quality of the environment.

### **Health and Human Services**

The foundation's health and wellness grants support organizations that offer community-based primary health and dental care, provide mental health services, separate substance abuse treatment programs, and deliver home health care, respite care and hospice care.

### **Scholarship Funds**

The foundation has nearly 200 scholarship funds established by generous individuals, businesses and organizations that help deserving students pursue college study and strengthen the future of the local communities. These funds each have their own eligibility requirements and cover many different areas of study, such as health care, the arts and engineering. Students from the Greater Bridgeport Area towns of Bridgeport, Easton, Fairfield, Milford, Monroe, Shelton, Stratford, Trumbull or Westport, CT may apply for scholarships. See web site for additional information.

## **Fields of Interest**

### **Subjects**

- Arts
- Children/youth, services
- Economic development
- Education
- Education, early childhood education
- Employment
- Environment
- Health care
- Higher education
- Housing/shelter
- Human services
- Nonprofit management
- Urban/community development
- Youth development



## Population Groups

- Economically disadvantaged

## Geographic Focus

- Connecticut

## Types of Support

- Equipment
- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Scholarship funds
- Scholarships--to individuals
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Newsletter
- Occasional report

## Application Information

Visit foundation web site for application guidelines. The foundation's staff will respond to a letter of inquiry with a preliminary assessment of the project's fit.

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter

Initial approach: Submit online letter of inquiry

Board meeting date(s): Quarterly

Deadline(s): Mar. 1 and Aug. 15 for letter of inquiry

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Vicki Craver \*, Chair.
- Katharine H. Welling \*, Vice-Chair.
- Juanita T. James, C.E.O. and Pres.
- Joseph R. Baker, V.P., Finance and Admin.
- Karen Brown, V.P., Progs.
- Fiona K. Hodgson, V.P., Devel. and Mktg.
- Suzanne Brown Peters, V.P., Fund for Women and Girls
- Hon. John P. Chiota \*, Secy.
- Ronald B. Noren \*, Treas.
- John Bailey
- Edgar W. Barksdale
- Abelardo S. Curdumi
- Amy C. Downer
- John Freeman
- Greg Hartch
- Gary A. Kraut
- Janet L. Lebovitz
- Martin L. McCann
- Lizanne G. Megrue
- Jackie Millan
- Jonathan Moffly
- Elisabeth Morten
- Peter T. Mott
- M. Suzette Recinos
- Janet L. Steinmayer

- Eileen L. Swerdlick
- Steven A. Wolff

## Staff

### Number of Staff

16 full-time professional  
 1 part-time professional  
 3 full-time support  
 1 part-time support

### Key Staff

*Note: Does not include officers.*

- Curline Bell, Finance Assoc.
- Alexis Bivens, Prog. Dir., Education and Youth Devel.
- Christa Chu, Donor Svcs. Assoc.
- Lauren Cross, Dir., Human Resources
- Tricia Hyacinth, Assoc., Fund for Women and Girls
- Kristy Jelenik, Devel. Mgr.
- Sharon Jones, Prog. Asst.
- Elaine Mintz, Prog. Dir., CNE/Arts and Culture
- Sallie Mitchell, Mktg. Dir.
- Alanna Morton, Exec. Asst.
- Marie Pronesti, Office Admin.
- Tiana Randretsanilo, Devel. and Finance Asst.
- Alison Riith, Knowledge Assoc.
- Sonia Rivera, Finance Asst.
- Carole Schwartz, Mgr., Corp. and Foundation Rels.
- Madeleine Thal, Donor Svcs. Mgr.
- Nancy von Euler, Prog. Dir., Economic Opportunity/HHS
- Jeff Yates, Comms. Mgr./Prog. Mgr., Environment

## Memberships

### Regional Associations of Grantmakers

- Connecticut Council for Philanthropy

### Affinity Groups

- Community Foundations of America
- Grantmakers for Children, Youth and Families
- Grantmakers for Education
- Women's Funding Network

### Associations and Other Philanthropic Organizations

- Connecticut Association of Nonprofits
- Council on Foundations

## Financial Data

Year ended 2012-06-30

Assets: \$150,440,396 (market value)

Gifts received: \$17,403,480

Expenditures: \$20,109,784

Total giving: \$16,628,149

Qualifying distributions: \$18,473,619

Giving activities include:

\$16,184,483 for 356 grants (high: \$440,700; low: \$147)

\$443,666 for 108 grants to individuals

## Online Communications

- [Philanthropy's Promise](#)
- [Fairfield County Community Foundation's Philanthropy Promise](#)
- [E-Newsletter](#)
- [Twitter](#)

## Additional Location Information

County: Fairfield

Metropolitan area: Bridgeport-Stamford-Norwalk, CT

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$440,700 to Connecticut Association for Human Services, Hartford, CT, in 2012. For a K-3 reading assessment pilot study
- \$350,000 to Child Health and Development Institute of Connecticut, Farmington, CT, in 2012. To replicate the Child First Model in four Connecticut communities
- \$315,250 to Bridgeport Public Schools, Bridgeport, CT, in 2012. For salary expenses and HR, organizational and curriculum assessments
- \$250,000 to Norwalk Community College Foundation, Norwalk, CT, in 2012. For Family Economic Security Program-Year 4 Renewal Grant
- \$187,900 to Domus Kids, Stamford, CT, in 2012. For expansion of the Family Advocate Program
- \$100,000 to International Documentary Association, Los Angeles, CA, in 2012. For Untitled Film
- \$7,500 to Neighborhood Studios of Fairfield County, Bridgeport, CT, in 2012. For Ailey Camp
- \$5,000 to Darien Emergency Medical Services, Darien, CT, in 2012. For general support
- \$5,000 to Middlebury College, Middlebury, VT, in 2012. For general support
- \$5,000 to Southwestern Connecticut Agency on Aging, Bridgeport, CT, in 2012. For general support

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## National Endowment for Financial Education

**Last Updated:** 2014-07-29

### At A Glance

(also known as NEFE)

1331 17th St., Ste. 1200

Denver, CO United States 80202-1595

Contact: Londell Jackson, Asst. Dir., Grants & Research

Fax: (303) 220-0838

E-mail: [ldj@nefe.org](mailto:ldj@nefe.org)

URL: [www.nefe.org](http://www.nefe.org)

### Type of Grantmaker

Operating foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$149,091,736

Total giving: \$169,365

### EIN

840632115

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Established in 1972 in CO.

### Limitations

Giving on a national basis.

No support for organizations lacking 501(c)(3) IRS status, or foreign organizations.

No grants to individuals, or for general operating support, deficits, salaries, capital costs, computer equipment, pass-through funding, conferences, seminars, fundraisers, sponsorships, endowments, challenge grants, matching funds, scholarships, or for registration fees.

### Purpose and Activities

The National Endowment for Financial Education (NEFE) is the only private, nonprofit, national foundation wholly dedicated to improving the financial well-being of all Americans. The mission of the National Endowment for Financial Education is to help individual Americans acquire the knowledge and skills necessary to take control of their financial destiny. NEFE's mission is grounded in the belief that regardless of background or income level, financially informed individuals are better able to 1) take control of their circumstances, 2) improve their quality of life, and 3) ensure a stable future for themselves and their families. NEFE's guiding principles are stated in eight initiatives. These initiatives describe how NEFE achieves its mission, and outlines the goals and standards that guide the foundation's activities. Every project or program undertaken by NEFE must fit within the

scope of at least one initiative. NEFE accomplishes its mission primarily by partnering with other organizations to: 1) provide practical, reliable, and unbiased financial education to members of the public, 2) accomplish research in the field of financial literacy education, and 3) create demand for financial education. NEFE's activities place special emphasis on those who face financial challenges that are not being addressed by others. Among the target audiences are: youth, low-income individuals and families, and people in difficult or unusual life circumstances. NEFE's partnerships and the foundation's own efforts result in a wide range of free and low-cost activities and materials, including: resources for consumers, materials for educators and facilitators, the NEFE High School Financial Planning Program, which includes joint efforts with numerous nonprofit, for-profit, and government entities to develop financial literacy resources for specific audiences, research, conferences, and think tanks on a variety of financial literacy topics, and grant awards to organizations and academic institutions whose work can contribute to the field of financial literacy.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Education Programs**

Although not restricted to a particular age group, the Education Programs area has been oriented primarily to providing financial planning information to youth, including NEFE's longest-standing public service effort, the NEFE High School Financial Planning Program Effort. Strategic Programs and Alliance: This action area works to help Americans improve the quality of their lives through financial education provided in cooperation with other nonprofit organizations and foundations, and occasional corporate sponsors. Multimedia Access: This action area represents NEFE's commitment to sharing its expertise in financial planning education with all those who might benefit from it, including consumers, educators, and the media. Innovative Thinking: The goal of this action area is to inspire creative ideas and new perspectives on personal finance, to communicate them broadly, and to assist in their actualization where appropriate. This action area supports fellowships programs, grantmaking, and research and strategic activities.

### **NEFE Fellows Program**

The NEFE Fellows Program recruits qualified individuals from diverse backgrounds who share a common interest in working on projects within NEFE's broad scope of activities and in gaining non-profit operations and management experience. NEFE fellowships are funded for periods of up to two years and directed primarily at new college graduates at the bachelor's and master's degree levels. Fellows are assigned to projects, and work with staff at NEFE headquarters in the Denver area, to gain both practical skills and meaningful professional experience through their tenure with the foundation. Fellows receive a salary of \$27,150 per year and an attractive benefits package. Application guidelines and contact information are available on foundation web site.

## **Fields of Interest**

### **Subjects**

- Education
- Education, public education
- Education, research
- Foundations (private grantmaking)

### **Geographic Focus**

- National

### **Types of Support**

- Program development
- Program evaluation
- Research

### **Publications**

- Application guidelines
- Informational brochure
- Newsletter

## **Application Information**

Full proposals will be accepted by invitation only following submission of inquiry. See foundation web site for application information.

Application form required.

Initial approach: Complete the Concept Inquiry form after checking guidelines and eligibility

Copies of proposal: 1

Board meeting date(s): Apr. and Nov.

Deadline(s): June and Dec.

Final notification: 5 business days following board meetings

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Alexander Gonzalez, Ph.D \*, Chair.
- Karen Vahouny \*, Vice-Chair.  
Affiliation(s):  
*Qorvis Communications, Founding Partner*
- Ted Beck \*, C.E.O. and Pres.
- Patrick Bannigan
- Michael A. Bedke
- Dorothy J. Bridges  
Affiliation(s):  
*First Bank of Washington, DC, C.E.O. and Pres.*
- Pip Coburn
- Denise V. Crawford
- John R. Woerner  
Affiliation(s):  
*Ameriprise Financial, Inc., Chief Strategy Officer and Pres. of Insurance*

## Memberships

### Associations and Other Philanthropic Organizations

- Colorado Nonprofit Association

## Financial Data

Year ended 2012-12-31

Assets: \$149,091,736 (market value)

Gifts received: \$701,600

Expenditures: \$7,029,737

Total giving: \$169,365

Qualifying distributions: \$5,449,134

Giving activities include:

\$169,365 for 3 grants (high: \$71,671; low: \$40,000)

\$5,003,883 for 4 foundation-administered programs

## Online Communications

- [YouTube](#)
- [E-Newsletter](#)
- [Twitter](#)

## Additional Location Information

County: Denver

Metropolitan area: Denver-Aurora, CO

Congressional district: Colorado District 01

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$106,511 to University of Arizona Foundation, Tucson, AZ, in 2010.
- \$81,249 to University of Notre Dame, Notre Dame, IN, in 2010.
- \$36,475 to Duke University, Durham, NC, in 2010.
- \$6,739 to University of Wisconsin, Madison, WI, in 2010.

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## The Baltimore Community Foundation

**Last Updated:** 2014-01-07

### At A Glance

2 E. Read St., 9th Fl.

Baltimore, MD United States 21202-6903

Telephone: (410) 332-4171

Contact: Gigi Wirtz, Dir., Comms.; For grants: Maya Smith, Prog. Asst.

Fax: (410) 837-4701

E-mail: [questions@bcf.org](mailto:questions@bcf.org)

URL: [www.bcf.org](http://www.bcf.org)

## Type of Grantmaker

Community foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$148,500,109

Total giving: \$20,855,776

## EIN

237180620

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Additional e-mail: [msmith@bcf.org](mailto:msmith@bcf.org); Grant application e-mail: [grants@bcf.org](mailto:grants@bcf.org); Application address: Anne Ross Knoeller, Baltimore Community Foundation, 2 E. Read St., 9th Fl., Baltimore, MD 21202

## Background

Incorporated in 1972 in MD.

In 1972, leaders of Baltimore's five major banks of that time joined together to establish the Community Foundation of the Greater Baltimore Area. Inspired by the success of the nation's first community foundation in Cleveland, Ohio, and a rapidly growing network of community foundations nationwide, co-founder Robert H. Levi of Mercantile-Safe Deposit and Trust, who would become the fledgling organization's first chairman, felt strongly that Baltimore needed "a philanthropic organization that was a gathering of all people--no color line, no religious affiliation, no special cause."

## Limitations

Giving primarily in Baltimore City and Baltimore County, MD.

No support for religious or sectarian purposes.

No grants to individuals (except for scholarships), or for capital campaigns, annual fund campaigns, or event sponsorships.

## Purpose and Activities

The foundation's mission is to inspire donors to achieve their charitable goals from generation to generation and to improve the quality of life in the Baltimore region through grantmaking, enlightened civic leadership, and strategic investments. BCF's strategic grantmaking focuses on the areas of human services, youth, education, transportation, neighborhoods, diversity, environment, arts and culture, and promoting Baltimore, MD.

## Fields of Interest

### Subjects

- Adult education--literacy, basic skills & GED
- Arts
- Community development, neighborhood development
- Education
- Environment
- Human services
- Transportation

### Population Groups

- Aging
- Youth

## Geographic Focus

- Maryland

## Types of Support

- Endowments
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Scholarship funds
- Scholarships--to individuals
- Seed money

- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Newsletter

## Application Information

Visit foundation web site for application guidelines pertaining to specific areas. Applications begin with a brief letter of inquiry; Prog. Officer may request a full proposal upon review of the letter.

Application form not required.

Applicants should submit the following:

1. Statement of problem project will address
2. Brief history of organization and description of its mission
3. Detailed description of project and amount of funding requested

Initial approach: Mail or e-mail letter of inquiry (2 pages)

Copies of proposal: 1

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): None for letters of inquiry

Final notification: Within 3 months of proposal deadlines

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Raymond L. Bank \*, Chair.  
Affiliation(s):  
*Raymond L. Bank and Associates, Pres. and C.O.O.*
- Tedd Alexander, III \*, Vice-Chair.  
Affiliation(s):  
*Credo Capital Management, LLC, Member*
- Laura L. Gamble \*, Vice-Chair. and Treas.  
Affiliation(s):  
*PNC Bank, Member*
- Thomas E. Wilcox \*, C.E.O. and Pres.  
Affiliation(s):  
*The Foundation Center, Tr.*
- Amy T. Seto, Exec. V.P. and C.O.O.
- Danista Hunte, V.P., Community Investment
- Ralph M. Serpe, V.P., Devel.
- Juliet A. Eurich \*, Secy.  
Affiliation(s):  
*Alvin and Fanny Blaustein Thalheimer Foundation, Member*
- Diane Bell-McKoy  
Affiliation(s):  
*Associated Black Charities, C.E.O. and Pres.*  
*Baltimore Management Corporation, Chair.*  
*East Baltimore Devel., Inc., Dir.*  
*WNBC, Board Member, Alex Brown Center for Entrepreneurship*
- Ellen N. Bernard
- Thomas S. Bozzuto  
Affiliation(s):  
*The Bozzuto Group, Member*
- Benjamin S. Carson, Sr., M.D.  
Affiliation(s):  
*The Johns Hopkins Hospital, Doctor*
- Richard W. Cass  
Affiliation(s):  
*Baltimore Ravens, Member*

- Louis R. Cestello  
Affiliation(s):  
*PNC Bank, Regional Pres., Greater Baltimore region*  
*Loyola College, Tr.*  
*Maryland Ready at Five Partnership, Chair.*
- Ronald J. Daniels  
Affiliation(s):  
*Johns Hopkins University, Member*
- Mychelle Y. Farmer, M.D.  
Affiliation(s):  
*Catholic Relief Services, Member*
- Mark R. Fetting  
Affiliation(s):  
*Legg Mason, Inc., Chair. and C.E.O.*
- Josh E. Fidler  
Affiliation(s):  
*Chesapeake Realty Partners, Member*
- Sheldon Goldseker  
Affiliation(s):  
*Goldseker Foundation, Member*
- Michael D. Hankin  
Affiliation(s):  
*Brown Advisory, Member*
- Ellen M. Heller  
Affiliation(s):  
*The Harry and Jeanette Weinberg Foundation, Member*
- Stephon A. Jackson  
Affiliation(s):  
*T. Rowe Price Associates, Member*
- Harry S. Johnson  
Affiliation(s):  
*Whiteford, Taylor & Preston, Partner*
- Patricia Joseph  
Affiliation(s):  
*The Shelter Foundation, Member*
- Patrick McCarthy  
Affiliation(s):  
*Annie E. Casey Foundation, Member*
- Wes Moore
- Michael P. Pinto  
Affiliation(s):  
*M&T Bank, Member*
- Marsha Y. Reeves  
Affiliation(s):  
*Pay Pal, Inc., Member*
- Stuart O. Simms  
Affiliation(s):  
*Brown, Goldstein and Levy, Member*
- Lenel Srochi-Meyerhoff
- Marc B. Terrill  
Affiliation(s):  
*The Associated: Jewish Community Federation of Baltimore, Pres.*
- Kenneth L. Thompson  
Affiliation(s):  
*Venable LLP, Member*
- Paul C. Wolman  
Affiliation(s):  
*Feats, Inc., Member*
- Steven G. Ziger  
Affiliation(s):



## **Staff**

### **Number of Staff**

25 full-time professional

2 part-time professional

3 full-time support

### **Key Staff**

*Note: Does not include officers.*

- Al Angarita, Dir., Technology
- Barbara Aylesworth, Sr. Prog. Off., Healthy Neighborhoods, Inc
- Dion Cartwright, Prog. Off.
- Cheryl Casciani, Dir., Neighborhood Sustainability
- Jesse Cowling, Donor Svcs. Off.
- Jonalyn Denlinger, Prog. Off.
- Jennifer Farrell, Exec. Asst. to the Pres.
- Adrienne Gieszl, Donor Svcs. Assoc.
- Demetreus Gregg, Finance Assoc.
- John Kirby, IT Consultant
- Anne Ross Knoeller, Grants Admin.
- Keisha A. Leverette, Donor Svcs. Off.
- Cristina Lopez, Campaign Mgr.
- Kevin Griffin Moreno, Sr. Prog. Off.
- John Muchai, Dir., Finance
- Michael Nguyen, Comms. Off.
- Kimberly O'Haro, Human Resources Mgr.
- Latricia Pittrell, Sr. Acct.
- Bernice Reed, Gifts Admin.
- Julie Reeder, Prog. Dir., Youth as Resources
- Rebecca Rothey, Dir., Major and Planned Giving
- Jennifer Seal, Comms. Off.
- Maya Smith, Prog. Asst.
- Anthony Varner, IT Consultant
- Jennifer Walen, Devel. Off.
- Melissa McC. Warlow, ED, Dir., Baker Fund Grants Prog.
- Ashley Williams, Campaign Asst.
- Gigi Casey Wirtz, Dir., Comms.

## **Memberships**

### **Regional Associations of Grantmakers**

- Association of Baltimore Area Grantmakers

### **Affinity Groups**

- Funders' Network for Smart Growth and Livable Communities
- Grantmakers for Education
- Grantmakers for Effective Organizations
- Grantmakers In the Arts
- Grassroots Grantmakers
- International Human Rights Funders Group
- National Scholarship Providers Association
- Neighborhood Funders Group

### **Associations and Other Philanthropic Organizations**

- Council on Foundations
- Greater Baltimore Committee
- Maryland Association of Nonprofit Organizations
- Maryland Community Foundations Association

## **Financial Data**

Year ended 2012-12-31

Assets: \$148,500,109 (market value)

Gifts received: \$25,036,294

Expenditures: \$44,271,737

Total giving: \$20,855,776

Qualifying distributions: \$41,165,940

Giving activities include:

\$20,855,776 for grants

## Online Communications

- [E-Newsletter](#)
- [Facebook](#)
- [LinkedIn](#)
- [Flickr](#)
- [Twitter](#)
- [YouTube](#)

## Additional Location Information

County: Baltimore City

Metropolitan area: Baltimore-Towson, MD

Congressional district: Maryland District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$3,637,317 to East Baltimore Development, Baltimore, MD, in 2012. For general support and various projects
- \$1,141,550 to Princeton University, Princeton, NJ, in 2012. For general support and various projects
- \$482,730 to Salvation Army of Baltimore, Baltimore, MD, in 2012. For general support and various projects
- \$267,050 to Johns Hopkins University, Baltimore, MD, in 2012. For general support and various projects
- \$253,947 to Baltimore Museum of Art, Baltimore, MD, in 2012. For general support and various projects
- \$157,673 to Greater Homewood Community Corporation, Baltimore, MD, in 2012. For general support and various projects
- \$25,000 to Lawrenceville School, Lawrenceville, NJ, in 2012. For general support and various projects
- \$20,000 to Saint Marys Outreach Center, Baltimore, MD, in 2012. For general support and various projects
- \$17,835 to Handel Choir of Baltimore, Baltimore, MD, in 2012. For general support and various projects
- \$17,500 to Banner Neighborhoods Community Corporation, Baltimore, MD, in 2012. For general support and various projects

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## Community Foundation of Greater Flint

**Last Updated:** 2013-07-10

### At A Glance

500 S. Saginaw St.  
Flint, MI United States 48502  
Telephone: (810) 767-8270  
Contact: Kathi Horton, Pres.  
Fax: (810) 767-0496  
E-mail: [info@cfgf.org](mailto:info@cfgf.org)  
URL: [www.cfgf.org](http://www.cfgf.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$147,222,393

Total giving: \$4,633,003

### EIN

382190667

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Additional e-mail: [khorton@cfgf.org](mailto:khorton@cfgf.org)

### Background

Established in 1988 in MI.

## **Limitations**

Giving primarily in Genesee County, MI.

No support for sectarian religious purposes.

No grants to individuals (except for scholarships), or for annual appeals, deficit reduction or routine operating expenses of existing organizations.

## **Purpose and Activities**

The foundation serves the common good in Genesee County - building a strong community by engaging people in philanthropy and developing the community's permanent endowment - now and for generations to come. The foundation seeks to respond to current or emerging needs in the local area in conservation and the environment, arts and humanities, education, health and human services, and leadership development.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Beautification and Historic Preservation**

The foundation provides support to organizations designed to make the City of Flint a more physically and culturally attractive place in which to live.

### **Health**

The foundation seeks to address current health issues including maternal, infant and children's health, mental health, substance abuse, school health education, and speech therapy.

### **Mini-Grants Program**

In order to ensure that resources are available for a broad spectrum of community organizations, the foundation sets aside funds for initiatives that are smaller in scope than those in the Community Leadership and Community Collaborations priorities. Proposals are generally funded in the \$500 - \$3,000 range, and priority is given to proposals that: 1) bring people who are typically separated by barriers (e.g., race, economic status, disability, age) together, creating a stronger sense of cohesion and inclusiveness within the community; 2) populations that have historically had challenges accessing resources, with particular consideration given to proposals that benefit people of color and children in poverty; and 3) support community-building events, particularly events that build a sense of community pride and identity.

### **Neighborhood Improvement**

The foundation provides funding to emerging and established citizen-based organizations in low-income neighborhoods that are solving significant local problems, building alliances with other community institutions, and developing community-based leadership.

### **Scholarships**

The foundations administers more than 60 scholarship funds established by donors to primarily benefit students across Genesee County, MI. Scholarships range from small one-time awards to larger multi-year awards. In most cases the scholarships are designated for graduates of particular high schools and typically provide partial support toward the full cost of higher education. Eligibility requirements, deadlines and application guidelines vary per fund. See web site for additional information.

### **Women and Girls**

The foundation seeks to encourage the advancement and full participation of women and girls in society by promoting the removal of barriers to their economic, educational, physical, emotional, social, artistic, and personal growth.

### **Youth**

The foundation supports charitable projects and programs that benefit youth in Genesee County.

## **Fields of Interest**

### **Subjects**

- Arts
- Children/youth, services
- Community development, neighborhood development
- Education
- Environment
- Environment, beautification programs
- Environment, natural resources
- Health care
- Historic preservation/historical societies
- Human services
- Humanities
- Leadership development
- Youth development, services

## Population Groups

- African Americans/Blacks
- Children/youth
- Economically disadvantaged
- Girls
- Women

## Geographic Focus

- Michigan

## Types of Support

- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Scholarship funds
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Occasional report
- Program policy statement

## Application Information

Visit foundation web site for application forms and additional guidelines per grant type.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Results expected from proposed grant
3. Qualifications of key personnel
4. Name, address and phone number of organization
5. Copy of IRS Determination Letter
6. Brief history of organization and description of its mission
7. Copy of most recent annual report/audited financial statement/990
8. How project's results will be evaluated or measured
9. Descriptive literature about organization
10. What distinguishes project from others in its field
11. Listing of board of directors, trustees, officers and other key people and their affiliations
12. Detailed description of project and amount of funding requested
13. Plans for cooperation with other organizations, if any
14. Contact person
15. Copy of current year's organizational budget and/or project budget
16. Additional materials/documentation

Initial approach: Telephone

Copies of proposal: 3

Board meeting date(s): Feb., Apr., June, Oct., and Dec.

Deadline(s): None. Once an application is received, the contact person listed on the application cover sheet will be contacted by a Program Officer to discuss a decision-making timeline

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Bobby Mukkamala \*, Chair.
- Shannon E. White \*, Vice-Chair.  
Affiliation(s):  
*Funchitecture, LLC, member*
- Kathi Horton \*, Pres.

- Mary Ittigson \*, V.P., Finance and Admin.
- AnnMarie VanDuyne \*, V.P., Philanthropic Svcs.
- Nancy J. Hanflik \*, Secy.  
Affiliation(s):  
*Law Office of Henry Hanflik, P.C., Member*
- F. James Cummins \*, Treas.  
Affiliation(s):  
*Baker College System, Member*
- Stephen Arellano  
Affiliation(s):  
*Arellano and Associates, LLC, Member*
- Troy Farah  
Affiliation(s):  
*West Second Street Associates, Partner*
- Wanda D. Harden  
Affiliation(s):  
*Flint Public Library, Public Relations Coord.*
- Sonya LaGore  
Affiliation(s):  
*OLV Investment Group, Member*
- David E. Lossing  
Affiliation(s):  
*University of Michigan, Dir., Government Rels.  
City of Linden, Mayor*
- Heidi McAra  
Affiliation(s):  
*The Paw Palace, Member*
- Mark Miller  
Affiliation(s):  
*General Motors Davison Road Processing Center, Member*
- Lawrence E. Moon  
Affiliation(s):  
*Lawrence E. Moon Funeral Homes, Pres.*
- Yeonjung Park  
Affiliation(s):  
*University of Michigan-Ann Arbor, Student*
- Mark Piper  
Affiliation(s):  
*Piper Realty, Member*
- Ira A. Rutherford
- T. Ardele Shaltz
- Sherri E. Stephens  
Affiliation(s):  
*Stephens Wealth Management Group, Pres. and Financial Advisor*
- Lori Tallman  
Affiliation(s):  
*Lori A. Tallman, P.L.C., Attorney-at-Law*
- Susan Tippet  
Affiliation(s):  
*Genesys Health Foundation, Member*
- Douglas B. Vance
- Karen Williams Weaver  
Affiliation(s):  
*Ennis Center for Children, Member*
- George D. Wilkinson  
Affiliation(s):  
*Word of Life Christian Church, Pastor  
Genesee Regional Chamber of Commerce, Member*
- Stephen Wilson  
Affiliation(s):  
*Lake Fenton High School, Student*

## Staff

### Number of Staff

11 full-time professional  
3 full-time support

### Key Staff

*Note: Does not include officers.*

- Jennifer Farrington, Prog. Assoc.
- Mary Jo Herbig, Dir., Comms.
- Sherry LaFave, Mgr., Fund and Gift Admin.
- Sandra Murphy, Dir., Donor Svcs.
- Lynn Williams, Sr. Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Council of Michigan Foundations

### Affinity Groups

- Neighborhood Funders Group

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$147,222,393 (market value)

Gifts received: \$841,993

Expenditures: \$6,186,537

Total giving: \$4,633,003

Qualifying distributions: \$5,074,831

Giving activities include:

\$4,633,003 for grants

## Additional Location Information

County: Genesee

Metropolitan area: Flint, MI

Congressional district: Michigan District 05

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## Research Corporation for Science Advancement

**Last Updated:** 2014-06-06

### At A Glance

4703 E. Camp Lowell Dr., Ste. 201  
Tucson, AZ United States 85712-1292  
Telephone: (520) 571-1111  
Contact: Daniel Gasch, C.F.O.  
Fax: (520) 571-1119  
E-mail: [awards@rescorp.org](mailto:awards@rescorp.org)  
URL: [www.rescorp.org](http://www.rescorp.org)

### Type of Grantmaker

Operating foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$146,724,496

Total giving: \$4,169,828

### EIN

131963407

## Background

Incorporated in 1912 in NY.

The technology transfer program for identifying, patenting and licensing inventions from academic institutions, operated for many years by Research Corporation, was transferred to Research Corporation Technologies, a nonprofit corporation subject to regular corporate income tax laws, on March 2, 1987, in accordance with Section 1605(c) of the Tax Reform Act of 1986. The foundation also transferred \$35 million as a program-related investment and all its patent rights to the new organization in accordance with the act.

## Limitations

Giving limited to the U.S.

No grants to individuals directly, or for building or endowment funds, indirect costs, common supplies and services, tuition, research leave to start new projects, faculty academic year salaries, post-doctoral or graduate student stipends, secretarial assistance, general support, scholarships, fellowships, publications, travel expenses to scientific meetings, or matching gifts; no loans.

## Purpose and Activities

Giving to advance academic science research and teaching. The awards programs include the Cottrell College Science Awards, Cottrell Scholars Awards, and Scialog Awards and are open to U.S. colleges and universities to support basic research in the physical sciences (physics, chemistry, and astronomy).

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Cottrell College Science Awards

The Cottrell College Science Award program is aimed at helping young faculty to start vigorous research programs at primarily undergraduate institutions. The awards support research in science disciplines with significant overlap with chemistry, physics, and astronomy. The program had initiatives for single investigators. The multi-investigator Cottrell College Science Award initiative accepts applications from teams with two or three members from the same institution. Total requests for Research Corporation (RC) funds for two-year awards must be \$35,000, with \$10,000 of institutional match for Single-Investigator Cottrell College Science Awards and \$75,000 or \$100,000, with \$25,000 institutional match for Multi-Investigator Cottrell College Science Awards coming from teams with two or three members, respectively. Expenses are limited to equipment, supplies, summer stipends for travel to conduct research outside the home institution. No indirect costs or fringe benefits (other than FICA at 7.65%) are allowed from award funds. Principal investigators must have faculty appointments in a department of chemistry, physics or astronomy, or if from another department, propose research that significantly overlaps with research in one of these three disciplines. For the Single-Investigator Initiative, applicants must be within the first three years of first faculty appointment. For the Multi-Investigator initiative, at least one team member must be within the first six years of first faculty appointment. Qualifying departments must offer at least the baccalaureate, but not doctoral, degrees. Proposed projects are judged on the basis of scientific originality, significance, feasibility, and ability of the principal investigator(s) and institution to sustain the activity. The potential of a proposed research project to add to scientific knowledge is a prime criterion in its evaluation, as is its potential for developing into long-term capable programs of research, capable of attracting future support from other agencies. For complete guidelines and description visit the program web site.

### Cottrell Scholar Awards

Cottrell Scholar Awards are for beginning faculty members who are committed to excel at both research and teaching. Applications should be tenure-track beginning faculty members whose primary appointment is in a Bachelor's and Ph.D. degree-granting department of astronomy, biochemistry, biophysics, chemistry, or physics, but not in a school of medicine or engineering. Eligibility is limited to those in the third year after their first tenure-track appointment. The proposal consists of brief proposals for both research and teaching. Originality, feasibility, and the prospect for significant fundamental advances to science are the main criteria for the research plan. Contributions to education, especially at the undergraduate level, aspirations for teaching, and the proposed strategies to achieve educational objectives are factors in assessment of the teaching plan. The ability of applicants to mount a strong research program and their commitment to teaching are weighed in the two-phase review process. The deadline for receipt of proposals is 5 pm (MST) on Aug. 1. Applications must conform to guidelines and directions, and need to be endorsed by the institution. Potential applicants can begin the online submission process by completing the online submission Eligibility Quiz. Consult the complete program guidelines on the website for full details.

### Scialog Awards

The Scialog Award program is aimed at seeding highly innovative, high risk/high reward fundamental research in targeted areas that address problems of global significance and require multidisciplinary solutions. The Scialog program funds groundbreaking research by recently tenured faculty members, who are designated Scialog Fellows, at U.S. academic institutions. Scialog Fellows are convened annually, along with other world class researchers, to share critical feedback on their projects and further develop research ideas. The conferences have an unusual format with a limited number of formal presentations and significant time spent in breakout sessions and other forms of dialog. Participants are challenged to form small teams and write short collaborative proposals "on the spot"; for additional seed funding based on new ideas that emerge during the conference. The awards support research in science disciplines relevant to the targeted problem, which includes

chemistry, physics, materials science and engineering. The first Scialog initiative, begun in 2010, is focused on basic research to enable clean, sustainable, affordable energy for a world rapidly heading toward a doubling of its energy needs by midcentury. The initiative is aimed at accelerating underlying scientific advances on the molecular and nano scales to improve the efficiency and scalability of technologies that use solar energy to produce electricity and fuels such as hydrogen. Since 2010, when Scialog was launched, 30 Scialog Fellows have received awards totaling \$3.25 million. In addition, nine teams, composed of Scialog Fellows and other researchers, have received Collaborative Innovation Awards totaling \$900 thousand, based on their proposals written at Scialog conferences. There is no budget required for awards and principle investigators are given wide latitude for how funds are expended. No indirect costs or fringe benefits (other than FICA/Medicare at 7.65%) and institutionally mandated fringe benefits for postdoctoral fellows are allowed from award funds. Principal investigators must have faculty appointments at U.S. academic colleges or universities that are at least baccalaureate granting institutions in disciplines that are relevant to the targeted area of research. For complete guidelines and description visit the program website.

## Fields of Interest

### Subjects

- Astronomy
- Chemistry
- Physics
- Science

## Geographic Focus

- National

## Types of Support

- Program development
- Research

## Publications

- Application guidelines
- Annual report
- Newsletter
- Occasional report

## Application Information

Only online applications will be accepted.

Application form required.

Initial approach: Fill out application request form on foundation web site

Board meeting date(s): Feb., Apr., and Nov.

Deadline(s): Deadlines vary from year to year

Final notification: Differs by program

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Frederick Gardner Cottrell‡
- Rachel Brown‡
- Elizabeth Hazen‡
- Donald F. Jones‡
- Edward C. Kendall‡
- Paul C. Mangelndorf
- Charles H. Townes
- Robert E. Waterman‡
- Robert R. Williams‡
- Robert B. Woodward‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Patrick S. Osmer \*, Chair.  
Affiliation(s):  
*Ohio State University, Chair. and Prof., Dept. of Astronomy*
- Robert Shelton, Ph.D., Pres.
- Robert B. Hallock \*, Secy.  
Affiliation(s):  
*University of Massachusetts, Distinguished Prof., Dept. of Physics*



- Daniel Gasch, C.F.O.
- G. Scott Clemons \*, Treas.  
Affiliation(s):  
*Brown Brothers Harriman and Co., Managing Dir.*
- Patricia C. Barron, Dir. Emeritus
- Stuart B. Crampton, Dir. Emeritus  
Affiliation(s):  
*Williams College, Barclay Jermain Prof. of Natural Philosophy*
- Robert Holland, Jr., Dir. Emeritus  
Affiliation(s):  
*Williams Capital Partners, Genl. Partner*
- Suzanne D. Jaffe \*, Dir. Emeritus  
Affiliation(s):  
*S.D.J. Assocs., Pres.*
- John P. Schaefer, Dir. Emeritus  
Affiliation(s):  
*LSST Corp., Pres.*
- Peter K. Dorhout  
Affiliation(s):  
*Colorado State University, Vice-Provost for Graduate Studies and Asst. V.P. for Research*
- Jonathan Hook
- Brent Iverson  
Affiliation(s):  
*University of Texas at Austin, Prof., Organic Chemistry and Biochemistry*
- Gayle P.W. Jackson  
Affiliation(s):  
*Energy Global, Inc., Pres.*
- Elizabeth McCormack  
Affiliation(s):  
*Bryn Mawr College, Prof., Dept of Physics*
- David L. Wenner
- Joan B. Woodard

## Science Advisory Committee

- Bert Chandler
- Mike Dennin
- Jordan Gerton
- Martin Gruebele
- Peter Iovine
- Nicola Pohl
- Veronika Szalai

## Staff

### Number of Staff

9 full-time professional

5 full-time support

### Key Staff

*Note: Does not include officers.*

- Kathy Parson, Ph.D., Prog. Off., Science Adv. Prog.
- Silvia Ronco, Ph.D., Prog. Off., Science Adv. Prog.
- Richard Wiener, Prog. Off., Science Adv. Prog.

## Financial Data

Year ended 2012-12-31

Assets: \$146,724,496 (market value)

Gifts received: \$664,306

Expenditures: \$8,752,905

Total giving: \$4,169,828

Qualifying distributions: \$8,554,535

Giving activities include:

\$4,169,828 for 206 grants (high: \$125,000; low: \$75)

\$8,554,535 for foundation-administered programs

## Online Communications

- [Twitter](#)
- [Grants Database](#)
- [Facebook](#)

## Additional Location Information

County: Pima

Metropolitan area: Tucson, AZ

Congressional district: Arizona District 02

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$250,000 to University of Utah, Salt Lake City, UT, in 2010. For research project, Nanoplasmonic Focusing of Light Fields to Amplify Non-Linear Optical Effects in Composite Photovoltaics
- \$100,000 to Pennsylvania State University, University Park, PA, in 2010. For research project, New Chemical Routes for Discovering and Improving Visible-Light Photocatalysts
- \$100,000 to Case Western Reserve University, Cleveland, OH, in 2010. For research project, Overcoming Shockley-Queisser Limit on PV Solar-Energy Conversion Efficiency Multiple Exciton Generation in One-Dimensional Nanostructures
- \$100,000 to Purdue University, West Lafayette, IN, in 2010. For research project, Photoconversion Physics in Quantum-Wire Arrays with Double-Gyroid Topology
- \$100,000 to Vanderbilt University, Nashville, TN, in 2010. For research project, Biologically Optimized Protein Films for Solar Energy Conversion
- \$100,000 to University of California, Davis, CA, in 2010. For research project, Bottom-Up Assembly of Nanoscale Heterojunctions for Photochemical Energy Conversion
- \$100,000 to Emory University, Atlanta, GA, in 2010. For research project, Directed Evolution of Hydrogenase for Efficient Light-Driven Hydrogen Production Via Quantum Dot-Enzyme Hybrid Systems
- \$100,000 to University of California, Irvine, CA, in 2010. For research project, Molecular Approach to Converting Solar Energy Into Chemical Fuel
- \$100,000 to North Carolina State University, Raleigh, NC, in 2010. For research project, Molecular-Level Design of Metal-Oxyfluoride/Organic Solids for Visible-Light Photocatalysis
- \$35,000 to William Paterson University of New Jersey, Wayne, NJ, in 2010. For research project, Leveraging Protein Homology for Rapid and Robust Molecular Dynamics Calculations

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## Harrison County Community Foundation, Inc.

Last Updated: 2014-07-02

### At A Glance

1523 Foundation Way , P.O. Box 279

Corydon, IN United States 47112-1552

Telephone: (812) 738-6668

Contact: Steven A. Gilliland, C.E.O.; For grants: Anna Curts, Grants Mgr.

Fax: (812) 738-6864

E-mail: [steveg@hccfindiana.org](mailto:steveg@hccfindiana.org)

URL: [www.hccfindiana.org](http://www.hccfindiana.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2013-12-31)

Assets: \$146,536,171

Total giving: \$4,660,063

### EIN

351986569

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Additional e-mail: [staff@hccfindiana.org](mailto:staff@hccfindiana.org); Grant inquiry e-mail: [annac@hccfindiana.org](mailto:annac@hccfindiana.org)

## **Background**

Established in 1996 in IN.

## **Limitations**

Giving limited to Harrison County, IN.

No support for religious organizations for the purpose of furthering their religion.

No grants to individuals (except for scholarships), or for reimbursement for previously purchased items or previously incurred expenses, or to purchase souvenirs or other personal items or real estate that has not been identified and appraised.

## **Purpose and Activities**

The foundation was established for the receipt of donations and distribution of income from permanent endowments for the philanthropic purposes of Harrison County, IN. Giving primarily for arts and culture, human services, recreation, government, health and safety, historical preservation, community projects, education and environment.

## **Fields of Interest**

### **Subjects**

- Adult education--literacy, basic skills & GED
- Arts
- Community/economic development
- Education
- Environment
- Government/public administration
- Health care
- Higher education
- Historic preservation/historical societies
- Human services
- Recreation
- Scholarships/financial aid
- Secondary school/education
- Youth development

### **Population Groups**

- Aging

## **Geographic Focus**

- Indiana

## **Types of Support**

- Building/renovation
- Capital campaigns
- Conferences/seminars
- Consulting services
- Continuing support
- Curriculum development
- Emergency funds
- Employee-related scholarships
- Employment
- General/operating support
- Land acquisition
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Publication
- Research
- Scholarships--to individuals
- Seed money

## **Publications**

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure

- Multi-year report
- Newsletter
- Program policy statement (including application guidelines)

## Application Information

Visit foundation web site for application forms and guidelines. All applicants are strongly encouraged to attend formal training sessions as announced, typically in May and Nov.

Application form required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Signature and title of chief executive officer
3. Qualifications of key personnel
4. Name, address and phone number of organization
5. Copy of IRS Determination Letter
6. Brief history of organization and description of its mission
7. Copy of most recent annual report/audited financial statement/990
8. Listing of board of directors, trustees, officers and other key people and their affiliations
9. Detailed description of project and amount of funding requested
10. Plans for cooperation with other organizations, if any
11. Contact person
12. Copy of current year's organizational budget and/or project budget
13. Listing of additional sources and amount of support
14. Additional materials/documentation

Initial approach: See web site

Board meeting date(s): Monthly, first Mon.

Deadline(s): Jan. 15 and July 15

Final notification: Mar. 15 and Sept. 15

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Jason Copperwaite \*, Chair.
- Heather Clunie \*, Vice-Chair.
- Steve A. Gilliland, C.E.O. and Pres.
- Scott Berkley \*, Secy.-Treas.
- Paul Beckort
- Kevin Burch
- Chad Coffman
- Scott Estes
- Cheryl Fisher
- Jim Isbell
- Phyllis J. Krush
- Barbara Middleton
- Shirley Raymond
- Joe Shireman
- Glenn Walker
- Carolyn Wallace

## Staff

### Number of Staff

5 full-time professional

1 full-time support

### Key Staff

*Note: Does not include officers.*

- Anna Curts, Grants Mgr.
- Derrick Grigsby, Dir., Finance
- Kim Harmon, Dir., Development
- Heather Stafford, Dir., Progs.
- Sarah Travis, Admin. Asst.

## Memberships

### Regional Associations of Grantmakers

- Indiana Grantmakers Alliance

#### **Affinity Groups**

- Center for Nonprofit Excellence
- Mission Investors Exchange

#### **Associations and Other Philanthropic Organizations**

- Council on Foundations

#### **Financial Data**

Year ended 2013-12-31

Assets: \$146,536,171 (market value)

Gifts received: \$11,189,787

Expenditures: \$5,298,850

Total giving: \$4,660,063

Qualifying distributions: \$4,660,063

Giving activities include:

\$4,660,063 for grants

#### **Online Communications**

- [Facebook](#)
- [E-Newsletter](#)

#### **Additional Location Information**

County: Harrison

Metropolitan area: Louisville-Jefferson County, KY-IN

Congressional district: Indiana District 09

#### **Selected Grants**

The following grants are a representative sample of this grantmaker's funding activity:

- \$252,101 to Lanesville Youth Baseball and Softball League, Lanesville, IN, in 2011. For construction of two new diamonds and one Pee Wee field
- \$73,457 to Harrison County Parks and Recreation, Corydon, IN, in 2011. To build a log cabin at the Battle of Corydon Park
- \$32,306 to Blue River Services, Corydon, IN, in 2011. To construct a basketball court at the Wyandotte House Youth shelter, and matching funds
- \$20,523 to Morgan Elementary School, Palmyra, IN, in 2011. To purchase Leveled Readers books and quizzes
- \$5,000 to Indiana University Southeast, New Albany, IN, in 2011. For family and children's programming at the IUS Ogle Center

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## **Community Foundation of Greater Greensboro, Inc.**

**Last Updated:** 2013-12-12

#### **At A Glance**

(formerly The Foundation of Greater Greensboro, Inc.)

Foundation Place , 330 S. Greene St., Ste. 100

Greensboro, NC United States 27401-2659

Telephone: (336) 379-9100

Contact: H. Walker Sanders, Pres.; For grants: Kevin Lundy, Prog. Off.

Fax: (336) 378-0725

E-mail: [info@cfgg.org](mailto:info@cfgg.org)

URL: [www.cfgg.org](http://www.cfgg.org)

#### **Type of Grantmaker**

Community foundation

#### **Financial Data**

(yr. ended 2012-12-31)

Assets: \$146,347,903

Total giving: \$11,534,146

#### **EIN**

## Additional Contact Information

Grant application e-mail: [grants@cfgg.org](mailto:grants@cfgg.org); Grant inquiry e-mail: [Klundy@cfgg.org](mailto:Klundy@cfgg.org)

## Background

Established in 1983 in NC.

## Limitations

Giving primarily in the greater Greensboro, NC, area.

No support for partisan purposes, or for programs that promote religious instruction or doctrine.

No grants to individuals (except for scholarships), or for capital campaigns, debt retirement, endowments, multi-year commitments, debt retirement, or endowments.

## Purpose and Activities

The foundation is dedicated to strengthening the community for both present and future generations by promoting philanthropy, building a collection of endowment funds, and serving as a leader in shaping effective responses to community issues and opportunities in the greater Greensboro, NC, area.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Building Stronger Neighborhoods

The Building Stronger Neighborhoods (BSN) Program connects with neighborhoods through organizational and developmental initiatives that work together to mobilize neighborhood assets and enhance quality of life. Building Stronger Neighborhoods is a grants and technical assistance program for neighborhoods with limited resources in greater Greensboro; visit the foundation's web site for more information.

### Community Grants Program

The foundation allocates support for a wide range of community issues through the Community Grants Program. Grants are awarded to meet community needs and opportunities in the arts and humanities, education, housing, building capacity of nonprofits, and building social capital (projects that help build and sustain connections among people and groups); local nonprofit organizations may also apply for grants to help strengthen their organizational capacity in various aspects of nonprofit management. Grants will vary in size, duration, and frequency, and are determined based on the merit of the program and its potential impact. Grants usually range in size from a few hundred dollars up to \$10,000; larger grants may be considered in rare occasions. Most grants are for single-year programs. Visit the foundation's web site for more information.

### Scholarship Program

Scholarships range from \$500 to \$10,000 offering financial assistance to individuals pursuing education through various scholarship funds. Individuals are selected on a competitive basis, considering academic and non-academic factors and demonstrated financial need. The funds target students from areas of interest including performance in high school, high school attended, and academic or career focus.

### Teen Grantmaking Council

With support from local and national funders and consultants, the foundation engages youth in philanthropy, as grantmakers, grantseekers, and participants in youth-led projects. Applications for funding are available in mid-October. Visit the foundation's web site for more information.

## Fields of Interest

### Subjects

- AIDS
- Arts
- Children/youth, services
- Community development, neighborhood development
- Community/economic development
- Education
- Environment
- Government/public administration
- Health care
- Health organizations, association
- Housing/shelter, development
- Human services
- Humanities

## **Population Groups**

- Adults
- Adults, men
- Adults, women
- African Americans/Blacks
- Aging
- AIDS, people with
- Asians/Pacific Islanders
- Blind/visually impaired
- Boys
- Children
- Children/youth
- Crime/abuse victims
- Deaf/hearing impaired
- Disabilities, people with
- Economically disadvantaged
- Girls
- Hispanics/Latinos
- Homeless
- Immigrants/refugees
- Indigenous peoples
- Infants/toddlers
- Infants/toddlers, female
- Infants/toddlers, male
- LGBTQ
- Men
- Mentally disabled
- Migrant workers
- Military/veterans
- Minorities
- Native Americans/American Indians
- Offenders/ex-offenders
- Physically disabled
- Single parents
- Substance abusers
- Terminal illness, people with
- Women
- Young adults
- Young adults, female
- Young adults, male
- Youth

## **Geographic Focus**

- North Carolina

## **Types of Support**

- Building/renovation
- Capital campaigns
- Conferences/seminars
- Consulting services
- Continuing support
- Curriculum development
- Emergency funds
- Employee-related scholarships
- Endowments
- Equipment
- Exchange programs
- Fellowships
- Film/video/radio
- General/operating support
- Income development
- Internship funds
- Land acquisition
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation

- Program-related investments/loans
- Publication
- Research
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Newsletter
- Occasional report
- Program policy statement

## **Application Information**

Visit foundation web site for application Cover Sheet and guidelines. Faxed or e-mailed applications are not accepted. The foundation strongly encourages attending a Grantseeker Orientation Workshop held approximately one month prior to each proposal deadline; registration is required.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Signature and title of chief executive officer
4. Results expected from proposed grant
5. Qualifications of key personnel
6. Statement of problem project will address
7. Population served
8. Name, address and phone number of organization
9. Copy of IRS Determination Letter
10. Brief history of organization and description of its mission
11. Copy of most recent annual report/audited financial statement/990
12. How project's results will be evaluated or measured
13. What distinguishes project from others in its field
14. Listing of board of directors, trustees, officers and other key people and their affiliations
15. Detailed description of project and amount of funding requested
16. Contact person
17. Copy of current year's organizational budget and/or project budget
18. Listing of additional sources and amount of support

Initial approach: Mail Cover Sheet with proposal, and attachments

Copies of proposal: 1

Board meeting date(s): Monthly

Deadline(s): May 15 and Sept. 16 for Community Grants Program; varies for others

Final notification: Within 10 weeks

Applications accepted in the following language(s): Spanish; willing to consider others as needed

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Kathy Manning \*, Chair.
- Mona G. Edwards, C.O.O.
- H. Walker Sanders, Pres.
- Jacqueline O'Connell, V.P., Finance and Admin. and C.F.O.
- Tara McKenzie Sandercock, Sr. V.P., Fdn. and Community Rels.
- Lynn Wooten, V.P., Mktg. and Comms.
- Michelle Thrift, Cont.
- John Bakane
- Nancy Brenner
- Suresh Chandra
- Rev. Odell Cleveland
- Lowell Easter



- John Englar
- Michelle Gethers-Clark
- Jon Glazman
- David Hagan
- Kathy Hinshaw
- Joyce Johnson
- Wallace "Buster" Johnson
- Barbara Lusk
- Harold Martin
- Susan McDonald
- Lawrence McSwain
- Ronald Milstein
- Elaine Ostrowski
- Martha Peddrick
- Reid L. Phillips
- Erica Procton
- Fairfax Reynolds
- Mable Scott
- Terry Simon
- Adrian Smith
- Andrew Spainhour
- Tim Tsujii

## Staff

### Number of Staff

13 full-time professional

2 part-time professional

### Key Staff

*Note: Does not include officers.*

- Diana Hedspeth, Grants Coord.
- Kevin Lundy, Prog. Off.
- Marrill McCarty, Proj. Coord.
- Donna Newton, Dir., Guilford Nonprofit Consortium and Liaison, Building Stronger Neighborhoods
- Traci Poole, Proj. Coord., Scholarships, Grants and Interactive Technology
- John Whisnant, Devel. Off.

## Memberships

### Regional Associations of Grantmakers

- North Carolina Network of Grantmakers

### Affinity Groups

- Funders Concerned About AIDS
- Grassroots Grantmakers
- Hispanics in Philanthropy
- Neighborhood Funders Group

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Guilford Nonprofit Consortium
- North Carolina Center for Nonprofits

## Financial Data

Year ended 2012-12-31

Assets: \$146,347,903 (market value)

Gifts received: \$26,531,564

Expenditures: \$13,463,983

Total giving: \$11,534,146

Qualifying distributions: \$12,394,178

Giving activities include:

\$11,534,146 for grants

## Online Communications

- [E-Newsletter](#)
- [RSS Feed](#)

- [Twitter](#)
- [Facebook](#)
- [Google Plus](#)
- [LinkedIn](#)
- [Pinterest](#)
- [YouTube](#)

## Additional Location Information

County: Guilford

Metropolitan area: Greensboro-High Point, NC

Congressional district: North Carolina District 06

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$855,394 to United Methodist Foundation of Western North Carolina, Huntersville, NC, in 2012. For general support
- \$783,852 to Fellowship Hall, Greensboro, NC, in 2012. For general support
- \$500,087 to Action Greensboro, Greensboro, NC, in 2012. For general support
- \$404,767 to Duke University, Durham, NC, in 2012. For general support
- \$314,176 to United Way of Greater Greensboro, Greensboro, NC, in 2012. For general support
- \$269,417 to Greensboro College, Greensboro, NC, in 2012. For general support
- \$130,467 to Triad Stage, Greensboro, NC, in 2012. For general support
- \$123,911 to Greensboro Urban Ministry, Greensboro, NC, in 2012. For general support
- \$20,000 to North Naples United Methodist Church, Naples, FL, in 2012. For general support
- \$15,000 to High Point University, High Point, NC, in 2012. For general support

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## Josiah Macy Jr. Foundation

**Last Updated:** 2014-05-02

### At A Glance

44 E. 64th St.

New York, NY United States 10065-7306

Telephone: (212) 486-2424

Contact: George E. Thibault M.D., Pres.; Peter Goodwin M.B.A., C.O.O. and Treas.

Fax: (212) 644-0765

E-mail: [info@macyfoundation.org](mailto:info@macyfoundation.org)

URL: [www.macyfoundation.org](http://www.macyfoundation.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2013-06-30)

Assets: \$144,037,503

Total giving: \$6,255,338

### EIN

135596895

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Incorporated in 1930 in NY.

Since 1930, the Josiah Macy Jr. Foundation has devoted itself to the promotion of health and the relief of suffering. Kate Macy Ladd established the foundation to honor the memory of her father, Josiah Macy Jr., who was an eighth generation descendant of Thomas Macy, who emigrated from England in 1635. In 1659, Thomas Macy and nine other men purchased Nantucket Island (then a part of New York) to seek religious freedom. Six generations and nearly 200 years later, Josiah Jr.'s grandfather, Captain Josiah Macy, left Nantucket and established a successful shipping firm in New York City. Under Captain Macy's sons and grandsons the firm prospered, opened one of the first oil refineries in New York, and ultimately was purchased by the Standard Oil Company. In 1876, Josiah Macy, Jr. (known as a prominent philanthropist) died of typhoid fever at the age 38. The family's philanthropic tradition was continued by his daughter, Kate, who by the time of her death in 1945 had given the foundation \$19 million. This endowment has grown and represents the sole source of the foundation's funds. Until 1945, the foundation focused its grantmaking on medical research in such fields as traumatic shock and war-related

psychiatric disorders, geriatrics and aging, arteriosclerosis, genetics and human development, and psychosomatic medicine. The foundation's extensive conference and publication program was also started during this period. From the end of World War II through the mid-1960s, the foundation shifted its focus to support the efforts of medical schools to expand and strengthen their basic science faculties. During that time, the foundation also began supporting the emerging fields of basic reproductive biology, human reproduction, and family planning, and fostered their incorporation into the biological, behavioral, and social science bases of academic obstetrics and gynecology. Since the mid-1970s, the overwhelming majority of the foundation's grants have supported projects that broaden and improve medical and health professional education. Today, it is the only national foundation solely dedicated to improving the education of health professionals.

## **Limitations**

Giving on a national basis.

No grants to individuals, or for travel, capital funds, operating budgets, general undesignated support annual fund appeals, financing, construction or renovation projects, research, scholarships, or fellowships; no loans.

## **Purpose and Activities**

Major interest in medicine and health. Support for enhancing and improving health professional and medical education in ways that will better the health of the public. The foundation's grantmaking is focused on projects that: a) Demonstrate or encourage interprofessional education and teamwork among health care professionals;b) Teach principles of patient safety, quality improvement, and system performance;c) Develop new models for clinical education, including community-based models;d)Increase the diversity of the health care professional workforce through career development for underrepresented minorities; and c) Improve education for the care of underserved populations.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Career Development in Health Professions Education**

This program supports initiatives to nurture creative faculty members who are devoted to health professional educational reform. It also supports initiatives to diversify the health professions in order to achieve the goal of uniform excellence in health care.

### **Education for the Care of Underserved Populations**

This program supports initiatives to increase the number of healthcare professionals who chose to serve in rural and inner city areas and some of the most vulnerable people in society--racial and ethnic minorities, elderly people, low-income patients and others--who are not receiving the care they need.

### **Employee Matching Gifts**

The foundation matches gifts from full-time employees, directors, director emeriti, and officers to qualified charitable organizations. The gifts are matched up to two dollars for every dollar contributed with a maximum annual match of \$10,000 per participant.

### **Interprofessional Education and Teamwork**

This program supports a variety of initiatives designed to support planned and rigorous interprofessional education, focusing on the strong evidence which demonstrates that health care delivered by well-functioning teams leads to better outcomes.

### **New Curriculum Content**

This program supports initiatives for incorporating patient safety, quality improvement, and population health into medical education curriculum.

### **New Models for Clinical Education**

This program supports initiatives that provide clinical education and training for the management of chronic diseases in outpatient or community-based settings.

### **The Macy Faculty Scholars Program**

The Macy Faculty Scholars program - the first of its kind - launched in December 2010. The program aims to accelerate needed reforms in health professions education to accommodate the dramatic changes occurring in medical practice and health care delivery. Under the program, the foundation will select up to five faculty leaders each year. Each Scholar will receive salary support at \$100,000 per year over two years. Scholars must be nominated by the Dean of their institutions, who must commit to protecting at least 50 percent of the Scholars' time to pursue education reform projects at their institution. Each school may nominate only one candidate each year, and will be expected to provide a senior faculty member to mentor the Scholar. The foundation will support educational change in each Scholar's institution and develop a national network for the Scholars, who will receive career advice from a National Advisory Committee and participate in an Annual Meeting for the program.

## **Fields of Interest**

### **Subjects**

- Health care
- Health sciences school/education
- Medical school/education
- Nursing school/education

- Public health school/education

### **Population Groups**

- African Americans/Blacks
- Economically disadvantaged
- Hispanics/Latinos
- Minorities
- Native Americans/American Indians
- Women

### **Geographic Focus**

- National

### **Types of Support**

- Conferences/seminars
- Curriculum development
- Employee matching gifts
- Fellowships
- Matching/challenge support
- Program development
- Program evaluation
- Publication

### **Publications**

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Newsletter
- Occasional report
- Program policy statement

### **Application Information**

Additional program information is available on the foundation's web site. The foundation no longer accepts submission of applications via mail or e-mail.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Results expected from proposed grant
3. Qualifications of key personnel
4. Statement of problem project will address
5. Population served
6. Name, address and phone number of organization
7. Copy of IRS Determination Letter
8. Brief history of organization and description of its mission
9. How project's results will be evaluated or measured
10. Detailed description of project and amount of funding requested
11. Contact person
12. Copy of current year's organizational budget and/or project budget
13. Listing of additional sources and amount of support

Initial approach: Letter of inquiry via foundation's web site

Copies of proposal: 1

Board meeting date(s): Jan., May, and Oct.

Deadline(s): None

Final notification: Within 3 months

Additional information: The proposal should also include a letter of endorsement from the sponsoring institution.

### **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Kate Macy Ladd‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- William H. Wright, II \*, Chair.
- George E. Thibault, M.D. \*, Pres.  
Affiliation(s):  
*Harvard Medical School, Federman Prof., Emeritus*  
*MGH Institute of Health Professions, Chair.*  
*New York Academy of Sciences, Board Member*  
*Institute on Medicine as a Profession, Board Member*  
*Lebanese American University, Board Member*  
*President's White House Fellows Commission, Member*
- Peter Goodwin, C.O.O. and Treas.  
Affiliation(s):  
*Sikora Center, Chair.*
- David Blumenthal, M.D., MPP  
Affiliation(s):  
*Partners HealthCare, Chief Health Information and Innovation Off.*  
*The Commonwealth Fund, Pres.*
- George Campbell, Jr., Ph.D.  
Affiliation(s):  
*The Cooper Union, Pres. Emeritus*  
*Consolidated Edison, Inc., Dir.*  
*Barnes and Noble Inc., Dir.*  
*New York State Foundation for Science, Technology and Innovation, Dir.*  
*Rensselaer Polytechnic Institute, Tr.*  
*Montefiore Medical Center, Tr.*  
*New York Hall of Science, Tr.*  
*Woodrow Wilson National Fellowship Foundation, Tr.*  
*Institute of International Education, Tr.*
- Linda Cronenwett, Ph.D., R.N.  
Affiliation(s):  
*University of North Carolina at Chapel Hill, Beerstecher Blackwell Team Professor and Former Dean*  
*Robert Wood Johnson Foundation, Co-Dir., Executive Nurse Fellows Program*  
*American Academy of Nursing, Fellow*
- Harvey V. Fineberg, M.D., Ph.D.  
Affiliation(s):  
*Institute of Medicine, President*
- Linda Fried, M.D., MPH  
Affiliation(s):  
*Columbia University Mailman School of Public Health, Dean and Delmar Professor of Public Health and Prof., Epidemiology*  
*Columbia University's College of Physicians and Surgeons, Prof. of Medicine*  
*Experience Corps, Co-Founder*  
*National Academy of Sciences' Institute of Medicine, Member*  
*Association of American Physicians, Member*  
*MacArthur Network on an Aging Society, Member*  
*World Economic Forum's Council on the Challenges of an Aging World, Member*
- Terry Fulmer, Ph.D., R.N.  
Affiliation(s):  
*Bouve College of Health Sciences, Prof. and Dean*  
*Northeastern University, Prof. of Public Policy and Urban Affairs, College of Social Sciences and Humanities*  
*Institute of Medicine, Member*  
*New York Academy of Medicine, Vice Chair.*  
*Massachusetts General Hospital, Attending Nurse and Sr. Nurse, Munn Center for Nursing Research*  
*American Academy of Nursing, Fellow*  
*Gerontological Society of America, Fellow*  
*New York Academy of Medicine, Fellow*  
*Veterans' Administration, Member, Geriatrics and Gerontology Advisory Committee*  
*The New York Public Library, Member, President's Council and Financial Svcs. Leadership Forum*
- Henry P. Johnson  
Affiliation(s):  
*Fiduciary Trust Company International, C.E.O. and President*  
*Vassar College, Tr.*  
*Frances Lehman Loeb Art Center, Board Liaison to the Advisory Board*

*Metropolitan Museum of Art, Bryant Fellow  
New York Public Library, Member, President's Council and Financial Services Leadership Forum  
Young Presidents' Organization, Member, New York Chapter*

- Paul G. Ramsey, M.D.  
Affiliation(s):  
*University of Washington School of Medicine, C.E.O. and Dean  
Association of American Physicians, Member  
Institute of Medicine, Member  
National Academy of Sciences, Member*
- George Rupp, Ph.D  
Affiliation(s):  
*International Rescue Committee, Former C.E.O. and Pres.*
- Steven M. Sayfer, M.D.  
Affiliation(s):  
*Montefiore Medical Center, C.E.O. and Pres.  
Albert Einstein College of Medicine, Prof. of Medicine  
Albert Einstein College of Medicine, Prof. of Epidemiology and Population Health  
New York Academy of Medicine, Fellow  
The Health Management Agency, Founding Member  
Healthcare Institute, Member  
Greater New York Hospital Association, Chair. Board of Governors  
League of Voluntary Hospitals and Homes, Chair.  
Hospital Association of New York State, Board Member  
Association of American Colleges, Board Member, Council of Teaching Hospitals  
Coalition to Protect America's Health Care, Board Member  
New York eHealth Collaborative, Board Member  
University HealthSystem Consortium, Board Member  
Chase Regional Advisory Board, Member*
- Gregory H. Warner, M.B.A.  
Affiliation(s):  
*Ingleside Investors, Pres.  
A.C. Israel Enterprises, Inc., Dir.  
Axis Capital, Dir.  
Liazon Corp., Dir.  
Starwood Opportunity Fund VII, Member, Advisory Board  
Rockwood Equity Partners, Member, Advisory Board  
Fidelity Family Office Services, Member, Advisory Board  
Every Baby Company, Member, Advisory Board  
Brick Church Day School, Board Member*

## **Staff**

### **Number of Staff**

2 full-time professional  
1 part-time professional  
3 full-time support

### **Key Staff**

*Note: Does not include officers.*

- Karen A. Butler, Exec. Asst. to C.O.O.
- Eric Hoffman, Prog. Asst., Macy Faculty Scholars Prog.
- Yasmine R. Legendre, M.P.A., Prog. Assoc.
- Stephen C. Schoenbaum, M.D., MPH, Special Advisor to the Pres.
- Ellen Witzkin, Exec. Asst. to the Pres.

## **Memberships**

### **Regional Associations of Grantmakers**

- Philanthropy New York

### **Affinity Groups**

- Grantmakers In Health

### **Associations and Other Philanthropic Organizations**

- Council on Foundations
- Nonprofit Coordinating Committee of New York
- Philanthropy Roundtable

## Financial Data

Year ended 2013-06-30

Assets: \$144,037,503 (market value)

Expenditures: \$9,786,597

Total giving: \$6,255,338

Qualifying distributions: \$8,563,244

Giving activities include:

\$6,093,628 for 58 grants (high: \$325,575; low: \$20)

\$161,710 employee matching gifts

\$464,352 for foundation-administered programs

## Online Communications

- [LinkedIn](#)
- [Twitter](#)

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$400,000 to Institute on Medicine as a Profession, New York, NY, in 2012. For Educating and Training to Professionalism Initiative
- \$375,000 to Institute of Medicine, Washington, DC, in 2012. For Governance and Financing of Graduate Medical Education
- \$304,937 to National Health Policy Forum, Washington, DC, in 2012. For Innovations in Education and Training for 21st Century Health Care Workforce
- \$280,669 to Research Foundation of the City University of New York, New York, NY, in 2012. For Hunter College and Weill Cornell Medical College to develop ITEACH (Integrating Transdisciplinary Education at Cornell/Hunter)
- \$229,370 to University of Colorado, Denver, CO, in 2012. To develop longitudinal, interprofessional and team building curriculum that integrated into preclinical and clinical training for all health professions students at UCD Anschutz Medical Campus
- \$211,958 to New York University Langone Medical Center, New York, NY, in 2012. For NYU 3T: Teaching, Technology, Teamwork
- \$204,209 to American Academy of Family Physicians, Leawood, KS, in 2012. For Tracking the output of Graduate Medical Education: How are Teaching Hospitals and Teaching Health Centers Meeting Society's Needs?
- \$150,000 to National Health Policy Forum, Washington, DC, in 2012. For Innovations in Education and Training for 21st Century Health Care Workforce: Education and Dialogue for Federal Policy Makers
- \$135,090 to Oregon Health and Science University, Portland, OR, in 2012. For Macy Faculty Scholar
- \$57,893 to Geisinger Center for Health Research, Danville, PA, in 2012. For Hands on Quality Improvements The Physician-Nurse Relationship

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## The Coleman Foundation, Inc.

Last Updated: 2014-03-25

### At A Glance

651 W. Washington Blvd., Ste. 306

Chicago, IL United States 60661-2134

Telephone: (312) 902-7120

Contact: Michael W. Hennessy, C.E.O. and Pres.

Fax: (313) 902-7124

E-mail: [info@colemanfoundation.org](mailto:info@colemanfoundation.org)

URL: [www.colemanfoundation.org](http://www.colemanfoundation.org)

### Type of Grantmaker

Independent foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$142,934,063

Total giving: \$5,893,359

## EIN

363025967

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Background

Trust established in 1951 in IL.

The Coleman Foundation, Inc, is a private, independent foundation established in the state of Illinois in 1951. The source of the endowment was the estates of Dorothy W. and J.D. Stetson Coleman.

## Limitations

Giving primarily in the Midwest, with emphasis on the metropolitan Chicago, IL, area; support outside the Midwest is only for selected programs.

No support for religious or political organizations.

No grants to individuals, or for deficit financing, ticket purchases, or student loans to individuals.

## Purpose and Activities

Giving for postsecondary, community, secondary and elementary education programs which focus on developing awareness of self-employment, and other selected postsecondary, secondary, and elementary education projects. Support also for cancer care and research well as for programs to aid the developmentally disabled in the metropolitan Chicago area.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Cancer Care

The foundation has been an advocate for raising the standards of cancer care in the Midwest region. The program's primary initiatives are cancer care including support services, treatment and research. A specific area of interest is providing support services for individuals diagnosed with cancer, their families and caregivers. The foundation supports translational research, intended to translate knowledge derived from laboratory work into clinical applications. With a desire to increase the body of knowledge and expertise in the region, endowed chairs in oncology have been established at leading institutions. To supplement the work of the endowed chair holders, the foundation occasionally supports educational programs for cancer patients and survivors and workshops for healthcare professionals.

### Disability Services

The foundation supports various programs aimed at helping individuals with disabilities achieve self-determination, self-reliance, and self-respect. These programs have historically been focused on individuals with developmental disabilities and have focused on housing, life skills and supportive employment.

### Entrepreneurship Education

The foundation is committed to the principles of self-determination, self-reliance, self-respect, and individual initiative. It believes these characteristics are essential to the development of entrepreneurs and their pursuit of self-employment and has worked to establish entrepreneurship as a career option and field of study for individuals of all ages. The foundation's work to advance entrepreneurship has included the establishment of Coleman Chairs in Entrepreneurship at colleges and universities across the nation, and the creation of the Council for Entrepreneurship Awareness and Education.

### General Education

The foundation considers general education grants to exceptional institutions. These grants are mostly within the city of Chicago and focused on the creation of innovative programs that provide education to underserved individuals. The support is targeted at innovative programs that educate young people in underserved communities. Revitalization of communities and building a base for economic growth and development is the objective of such support.

## Fields of Interest

### Subjects

- Adult/continuing education
- Business school/education
- Cancer
- Cancer research
- Community development, small businesses
- Community/economic development
- Education
- Elementary school/education
- Higher education
- Human services
- Medical care, rehabilitation
- Secondary school/education



## Population Groups

- Disabilities, people with
- Economically disadvantaged

## Geographic Focus

- Illinois

## Types of Support

- Building/renovation
- Capital campaigns
- Conferences/seminars
- Curriculum development
- Equipment
- General/operating support
- Income development
- Matching/challenge support
- Professorships
- Program development
- Program-related investments/loans
- Research
- Scholarship funds

## Publications

- Application guidelines
- Financial statement
- Grants list
- Occasional report

## Application Information

Brochures, videotapes, CDs and other attachments should not be sent with the letter of inquiry. Full grant proposals should only be submitted upon invitation by the foundation. Refer to website for application requirements. Application form available on website.

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. How project's results will be evaluated or measured
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Copy of current year's organizational budget and/or project budget
8. Listing of additional sources and amount of support

Initial approach: Concise letter of inquiry. The foundation may then contact the applicant for a full application

Copies of proposal: 1

Board meeting date(s): Usually in Feb., May, Aug., and Nov.

Deadline(s): Rolling deadline schedule with quarterly consideration

Final notification: 3 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- J.D. Stetson Coleman‡
- Dorothy W. Coleman‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Michael W. Hennessy \*, C.E.O. and Pres.  
Affiliation(s):  
*The John E. and Jeanne T. Hughes Charitable Foundation, Inc., V.P. and Dir.*
- James H. Jones \*, Secy.
- Trevor C. Davies \*, C.F.O. and Treas.

- John E. Hughes \*, Chair. Emeritus  
Affiliation(s):  
*The John E. and Jeanne T. Hughes Charitable Foundation, Inc., Pres. and Dir.*
- R. Michael Furlong
- Daniel Wanzenberg

## Staff

### Number of Staff

4 full-time professional

1 full-time support

2 shared staff (shared with John E. & Jeanne T. Hughes Charitable Foundation)

### Key Staff

*Note: Does not include officers.*

- Rosa Berardi, Prog. Off.
- Clark McCain, Sr. Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Donors Forum (IL)

### Affinity Groups

- Exponent Philanthropy
- Grantmakers for Effective Organizations

### Associations and Other Philanthropic Organizations

- Philanthropy Roundtable

## Financial Data

Year ended 2012-12-31

Assets: \$142,934,063 (market value)

Expenditures: \$7,818,772

Total giving: \$5,893,359

Qualifying distributions: \$7,048,895

Giving activities include:

\$5,893,359 for 125 grants (high: \$250,000; low: \$2,000)

## Online Communications

- [Blog](#)

## Additional Location Information

County: Cook

Metropolitan area: Chicago-Naperville-Joliet, IL-IN-WI

Congressional district: Illinois District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$250,000 to National Association for Community College Entrepreneurship, Springfield, MA, in 2012. For General Operating Support
- \$220,000 to Almost Home Kids, Naperville, IL, in 2012. For Capital Support
- \$200,000 to American Cancer Society, Chicago, IL, in 2012. For Program Support
- \$200,000 to Seguin Services, Cicero, IL, in 2012. For Program Support
- \$108,300 to Almost Home Kids, Naperville, IL, in 2012. For Capital Support
- \$100,000 to Gildas Club Chicago, Chicago, IL, in 2012. For General Operating Support
- \$100,000 to University of Illinois at Chicago, Chicago, IL, in 2012. For Program Support
- \$79,500 to Cancer Center for Healthy Living, Peoria, IL, in 2012. For Program Support
- \$47,100 to Ray Graham Association for People with Disabilities, Downers Grove, IL, in 2012. For Program Support
- \$18,000 to Quincy University, Quincy, IL, in 2012. For Program Support

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## The Memorial Foundation

**Last Updated:** 2013-01-02

## At A Glance

Bluegrass Commons I , 100 Bluegrass Commons Blvd., Ste. 320  
Hendersonville, TN United States 37075-2735  
Telephone: (615) 822-9499  
Contact: J.D. Elliott, Pres.  
Fax: (615) 822-7797  
E-mail: [jelliott@memfoundation.org](mailto:jelliott@memfoundation.org)  
URL: [www.memfoundation.org](http://www.memfoundation.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public
- Health conversion foundation

## Financial Data

(yr. ended 2011-12-31)  
Assets: \$139,648,607  
Total giving: \$6,622,511

## EIN

621202302

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 1994 in TN; converted from Nashville Memorial Hospital.

## Limitations

Giving limited to the city of Madison and Davidson County, TN, and the surrounding communities of Cheatham, Sumner, and Robertson, served by Nashville Memorial Hospital.

No support for church-specific projects, political activities, or private foundations.

No grants for social events, fundraising, publication, research, endowments, advertising, or debt retirement.

## Purpose and Activities

The foundation promotes and advances the health, medical care, well-being and the quality of life of the residents of middle Tennessee, with a particular emphasis on the residents of Madison, Tennessee, Sumner and Davidson counties, by making grants to organizations that focus on health and rehabilitation services, youth and children, senior citizens, education, human services, and substance abuse.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Grants

Awards grants to nonprofit organizations that provide services to people who live in the geographic area served by Nashville Memorial Hospital. Requests for support outside this area are not considered. The organization places special emphasis on assisting organizations that focus on health, youth and children, senior citizens, education, human and social services, community services, and substance abuse are given.

## Fields of Interest

### Subjects

- Aging, centers/services
- Boys & girls clubs
- Education
- Family services, domestic violence
- Food banks
- Higher education
- Human services
- Medical care, rehabilitation
- Mental health/crisis services, rape victim services
- Offenders/ex-offenders, services
- Substance abuse, services

- Youth development

## **Geographic Focus**

- Tennessee

## **Types of Support**

- Building/renovation
- Capital campaigns
- Continuing support
- Emergency funds
- Equipment
- General/operating support
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Grants list
- Informational brochure (including application guidelines)
- Occasional report

## **Application Information**

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. How project's results will be evaluated or measured
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Copy of current year's organizational budget and/or project budget

Initial approach: Meeting with staff

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: 90 days

## **Officers**

- J.D. Elliott \*, Pres.
- Scott Perry \*, V.P.
- Donna Kay Vick \*, Secy.
- Judy Milliken, Cont.

## **Staff**

### **Number of Staff**

2 full-time professional

2 full-time support

1 part-time support

### **Key Staff**

*Note: Does not include officers.*

- Joyce A. Douglas, Admin. Asst.

## **Memberships**

### **Regional Associations of Grantmakers**

- Southeastern Council of Foundations

## **Affinity Groups**

- Grantmakers In Health

## Financial Data

Year ended 2011-12-31

Assets: \$139,648,607 (market value)

Gifts received: \$1,198,700

Expenditures: \$8,799,842

Total giving: \$6,622,511

Qualifying distributions: N/A

Giving activities include:

\$6,622,511 for 167 grants (high: \$3,000,000; low: \$6,000)

## Additional Location Information

County: Sumner

Metropolitan area: Nashville-Davidson-Murfreesboro-Franklin, TN

Congressional district: Tennessee District 06

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## Robins Foundation

**Last Updated:** 2014-08-13

### At A Glance

10 S. 3rd St.

Richmond, VA United States 23219-3702

Telephone: (804) 523-1144

Contact: Martha Loving, Office Mgr.

Fax: (804) 523-1150

URL: [www.robinsfdn.org](http://www.robinsfdn.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$139,242,814

Total giving: \$5,875,785

## EIN

540784484

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Additional Contact Information

E-mail for Martha Loving: [martha.lovings@robinsfdn.org](mailto:martha.lovings@robinsfdn.org)

## Background

Established in 1957 in VA.

E. Claiborne Robins created the Robins Foundation in 1957. Mr. Robins is best known for his transforming gifts to the University of Richmond, but he also supported a wide range of Richmond causes during his lifetime. His philanthropy reflected his affection for the community that had nurtured him and helped him to build the A.H. Robins Company. At his death in 1995, he provided generously for the foundation in his estate.

## Limitations

Giving primarily in Richmond, VA; the foundation does not accept unsolicited proposals from organizations outside of the Richmond metropolitan area.

No grants to individuals, or for annual funds or special events.

## Purpose and Activities

Gives to a broad range of causes in the Richmond, VA, area.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Focus Area Grants

These grants are directed to three goal areas. 1) Strong Non Profits support governance; management; program; relationship building and finance to enhance the areas that are most critical to non-profit success. 2) Thriving People will support organizations and projects for children ages 0-18, and their parents/caregivers to ensure children are prepared for kindergarten, are engaged in school, thrive academically, and graduate on time with the necessary skills and opportunities for success. 3) Dynamic Community will support organizations and projects that empower children and families with opportunities to learn, play, discover, dream and grow into healthy and successful citizens who contribute to the vibrancy and well-being of our community.

### Mini Grants

Small grants are directed to strengthen a key capacity building or technology area of an organization (i.e. case development, staff coaching, marketing, board development, staff and/board strategic retreats, succession planning); bridge or transition funding due to mergers; or when other fast turn-around needs arise. Notification is immediate. Grant application will be available Jan. 2015.

### Strategic Partnerships

The foundation provides funding for multi-year support for organizational growth in critical operations areas: Governance, Management, Finance, Fundraising/Development (Relationship Building) and Program. The foundation is currently measuring and evaluating a pilot program for selected organizations at catalytic moments in their organizational development.

### The Lora M. and E. Claiborne Robins, Sr. Community Innovation Grant

This once-a-year opportunity funds a community project that celebrates the innovative, collaborative spirit of Greater Richmond with an award of up to \$500,000 over the course of three years. Projects will address unmet community needs in our emerging neighborhoods and demonstrate an innovative approach to solving those needs, a record of strong leadership, and strategic collaboration with other community groups and interested parties.

## Fields of Interest

### Subjects

- Children/youth, services

### Geographic Focus

- Virginia

### Types of Support

- Building/renovation
- Capital campaigns
- Consulting services
- Endowments
- Equipment
- General/operating support
- Income development
- Land acquisition
- Management development/capacity building
- Program development
- Program evaluation
- Program-related investments/loans

### Publications

- Grants list

## Application Information

The foundation is not accepting unsolicited grant proposals at this time. See foundation web site for updated application information.

Application form not required.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- E. Claiborne Robins‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Sheryl Robins Nolt \*, Pres.

- Robin R. Shield, V.P.
- Kelly Chopus, Exec. Dir.
- Reginald N. Jones \*, Treas.
- Lewis T. Booker
- E. Bruce Heilman
- Ann Carol Marchant
- Robert E. Marchant
- Betty Robins Porter
- E. Claiborne Robins, Jr.
- Gregory C. Robins
- Juliet E. Shield-Taylor

## Staff

### Number of Staff

5 full-time professional  
1 part-time professional  
1 full-time support

### Key Staff

*Note: Does not include officers.*

- Chris Chin, Dir., Community Partnerships
- Robert Dortch, Dir., Community Innovation
- Martha T. Loving, Office Mgr.
- Courtney Rice, Mgr., Special Projects

## Memberships

### Regional Associations of Grantmakers

- Southeastern Council of Foundations

### Affinity Groups

- Exponent Philanthropy
- Grantmakers for Effective Organizations

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$139,242,814 (market value)

Expenditures: \$8,714,366

Total giving: \$5,875,785

Qualifying distributions: \$6,932,586

Giving activities include:

\$5,875,785 for 130 grants

\$447,647 for 1 loan/program-related investment

## Online Communications

- [Grants List](#)

## Additional Location Information

County: Richmond City

Metropolitan area: Richmond, VA

Congressional district: Virginia District 03

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$1,000,000 to University of Richmond, Richmond, VA, in 2010.
- \$500,000 to University of Richmond, Richmond, VA, in 2010.
- \$150,000 to Saint Josephs Villa, Richmond, VA, in 2010.
- \$125,000 to Maymont Foundation, Richmond, VA, in 2010.
- \$123,600 to United Way of Greater Richmond and Petersburg, Richmond, VA, in 2010.
- \$109,887 to Family Lifeline, Richmond, VA, in 2010.
- \$31,000 to United Way of Greater Richmond and Petersburg, Richmond, VA, in 2010.
- \$15,000 to Historic Richmond Foundation, Richmond, VA, in 2010.

- \$15,000 to Richmond Organization for Sexual Minority Youth, Richmond, VA, in 2010.
- \$10,000 to University of Richmond, Richmond, VA, in 2010.

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## GAR Foundation

**Last Updated:** 2014-05-02

### At A Glance

277 E. Mill St.

Akron, OH United States 44308-1735

Telephone: (330) 576-2926

Contact: Christine Amer Mayer, Pres.

Fax: (330) 330-437-2843

E-mail: [info@garfdn.org](mailto:info@garfdn.org)

URL: [www.garfoundation.org](http://www.garfoundation.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$136,333,904

Total giving: \$6,039,541

### EIN

346577710

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

E-mail for Christine Amer Mayer: [cmayer@garfdn.org](mailto:cmayer@garfdn.org)

### Background

Trust established in 1967 in OH.

The GAR (pronounced "jee-ay'ar") Foundation was born out of the financial success and growth of Roadway Express, Inc. and its chairman and major shareholder, Galen J. Roush. In 1956, Roadway Express became a publicly owned company, with the family controlling just over 50% of the stock. Over the next ten years, Roadway's annual revenues grew from less than \$43 million to more than \$134 million. The price of Roadway stock also steadily increased. In 1967, the foundation was established as a trust and, upon the advice of Mr. Roush's attorney, Lisle Buckingham, half of Mr. Roush's estate was designated to fund it. The name "GAR Foundation" is an acronym for "Galen and Ruth"

### Limitations

Giving primarily in the Akron-Summit County area and secondarily in Cuyahoga, Stark, Medina, Portage and Wayne counties, OH.

No support for private non-operating foundations, health care institutions (except for collaborative efforts designed to reduce costs and promote efficient delivery of services), or national organizations.

No grants to individuals, or for medical research, capital funding for churches or synagogues, or computers for schools.

### Purpose and Activities

Grants for education, arts and arts education, health and social services, civic enhancement, and for nonprofit enhancement.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Arts and Arts Education

The grant area supports arts programs and cultural institutions within Summit County and the region. The two priorities are: 1) to support arts institutions that enhance the quality of life in the foundation's area, serving a significant number of Summit County residents and making a significant contribution to the region's reputation and identity; and 2) to support arts education programs where excellence is measured by the level of participation-based programs delivered to low-income Summit County children, offered in collaboration with other arts organizations and historical or educational institutions.

#### Civic Enhancement

The grant area's three priorities are enhancing the economic strength of Akron and Northeast Ohio, improving the vibrancy of



place and supporting community development.

## **Education**

From early childhood to K-12 education and beyond, the foundation funds quality, strategic programs all along the educational continuum in Summit County. The foundation's education grantmaking focuses on the following priorities: 1) Early Childhood Education: supporting parent education and school readiness, and access to high-quality programs; 2) Kindergarten through 12 (K-12): supporting efforts to increase high school graduation; out-of-school time (OST) enrichment; STEM and options for low-income learners; 3) Bridge to Post-Secondary: increase students continuing on to post-secondary education; increase availability of financial resources for students to attend post-secondary options; 4) Post-Secondary: improve retention and completion among targeted, at-risk students; support efforts that tie post-secondary education to workforce needs; 5) Lifelong Learning: support adult literacy; and 6) Systemic Change & Improvement: support for programs that improve the overall function of and outcomes produced by the education system, including smoothing the transitions from one level of education to the next.

### **Educator Initiative Grant Program**

The program offers funding to teams of K-12 educators who are working to develop, implement, and assess instructional strategies for 1) helping their students meet Ohio's academic standards and; 2) helping their schools achieve goals identified in their school improvement plans. Only teams of educators from public, private, parochial and charter schools in Summit County may apply for Educator Initiative Grants. These teams must consist of at least two K-12 classroom teachers. Administrators may also be team members, but should submit applications only in concert with a group of teachers who will share responsibility for implementing the project for which funding is requested. All applications must be endorsed by the appropriate building principals and, in the case of public schools, by the appropriate district superintendents (by the superintendents of all districts that will be directly affected by the project). One superintendent must accept fiscal responsibility for any grant resulting from the application. For operations about the EIG Program, Contact: Jolene Reinhart, e-mail: [jdgreinhardt@gmail.com](mailto:jdgreinhardt@gmail.com).

## **Health and Social Services**

The program supports health and social service agencies serving Summit County. Funding is in two specific categories: 1) Community care grants are awarded to support youth development programs that help at-risk young people define better futures for themselves, to support organizations which provide basic needs to people in crisis, for programs helping seniors remain in their homes, for organizations which provide health care to people at risk and to those who help address immediate housing needs of low-income families; 2) Community catalyst grants are awarded to enhance the capacity, reach and effectiveness of multiple agencies or systems and to help address key community issues.

## **Non-Profit Enhancement**

The program facilitates collaboration among nonprofits, disseminates information, and provides technical assistance to grantees and other partners. Grants are awarded to enhance and support the effectiveness of GAR grantees and applicants and to bolster the effectiveness and efficiency of Summit County's nonprofit sector.

## **Fields of Interest**

### **Subjects**

- Arts
- Economics
- Education, early childhood education
- Higher education
- Human services
- Secondary school/education
- Youth, services

### **Population Groups**

- Adults
- African Americans/Blacks
- Aging
- Asians/Pacific Islanders
- Boys
- Children
- Children/youth
- Crime/abuse victims
- Economically disadvantaged
- Hispanics/Latinos
- Homeless
- Immigrants/refugees
- Infants/toddlers
- Minorities
- Women
- Young adults
- Young adults, female
- Young adults, male

- Youth

## Geographic Focus

- Ohio

## Types of Support

- Annual campaigns
- Building/renovation
- Continuing support
- Curriculum development
- Debt reduction
- Employee matching gifts
- Endowments
- Equipment
- General/operating support
- Land acquisition
- Management development/capacity building
- Matching/challenge support
- Program development
- Scholarship funds
- Seed money

## Publications

- Application guidelines
- Newsletter

## Application Information

If you are a past grantee and your current request is for the same purpose as previously awarded, complete a full online application. Paper applications not accepted.

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Copy of most recent annual report/audited financial statement/990
3. Listing of board of directors, trustees, officers and other key people and their affiliations

Initial approach: Online letter of inquiry

Copies of proposal: 1

Board meeting date(s): Feb., May, Aug., and Nov.

Deadline(s): See foundation web site for current deadlines

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Ruth C. Roush‡
- Galen Roush‡

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Christine Amer Mayer, Pres.
- Kirstin S. Toth, Sr. V.P.
- Douglas A. Wilson
- PNC Bank N.A.

## Staff

### Number of Staff

5 full-time professional

### Key Staff

*Note: Does not include officers.*

- Kate Harmon, Comms. and Ops. Mgr.
- Julie Rittenhouse, Prog. Off.
- Julie Watson, Grants Mgr.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Ohio

### Affinity Groups

- Fund for Our Economic Future

## Financial Data

Year ended 2012-12-31

Assets: \$136,333,904 (market value)

Expenditures: \$9,412,774

Total giving: \$6,039,541

Qualifying distributions: \$8,509,211

Giving activities include:

\$6,039,541 for 210 grants (high: \$216,000; low: \$50)

## Online Communications

- [Pinterest](#)
- [Flickr](#)
- [Twitter](#)
- [Facebook](#)
- [LinkedIn](#)
- [Grants Database](#)
- [YouTube](#)

## Additional Location Information

County: Summit

Metropolitan area: Akron, OH

Congressional district: Ohio District 11

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$650,000 to Akron Public Schools, Akron, OH, in 2012. For challenge grant
- \$575,500 to United Way of Summit County, Akron, OH, in 2010. For Northeast Ohio United Way Reg Task Force Plan
- \$500,000 to Fund for Our Economic Future, Cleveland, OH, in 2010. For Phase Three of the Project
- \$308,000 to Akron Public Schools, Akron, OH, in 2010.
- \$300,000 to Stan Hywet Hall and Gardens, Akron, OH, in 2010. For general support
- \$299,841 to Educator Initiative Grants Program, Summit County, OH, in 2012. For teacher initiated classroom-based projects
- \$150,000 to Akron Public Schools, Akron, OH, in 2012. For STEM High School
- \$120,000 to Greenleaf Family Center, Akron, OH, in 2012. For SPARK (kindergarten readiness program)
- \$110,000 to Akron Art Museum, Akron, OH, in 2012. For operating support
- \$100,000 to Salvation Army of Summit County, Akron, OH, in 2010. For Learning Zone Program
- \$70,000 to Akron Public Schools, Akron, OH, in 2012. For Great Leaders Program
- \$70,000 to Akron Community Foundation, Akron, OH, in 2010. For Chenoweth Endowment Funds
- \$40,000 to All-American Soap Box Derby, Akron, OH, in 2012. For operations and curriculum development
- \$35,000 to Info Line, Akron, OH, in 2010. For Project Connect Operations
- \$25,000 to Service Corps of Retired Executives Association, Akron, OH, in 2010. For Marketing and Administrative Support
- \$17,000 to Childrens Concert Society of Akron, Akron, OH, in 2010. For Concert Hall Series and Outreach Program
- \$17,000 to Educational Service Center of Cuyahoga County, Valley View, OH, in 2012. For Learning Leaders of Summit County: A Principals' Academy II
- \$10,000 to International Institute, Akron, OH, in 2010. For Educational Programming

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## The Hyams Foundation, Inc.

Last Updated: 2014-07-18

### At A Glance

(formerly Sarah A. Hyams Fund)

50 Federal St., 9th Fl.

Boston, MA United States 02110-2509

Telephone: (617) 426-5600

Contact: Elizabeth B. Smith, Exec. Dir.

Fax: (617) 426-5696

E-mail: [info@hyamsfoundation.org](mailto:info@hyamsfoundation.org)

URL: [www.hyamsfoundation.org](http://www.hyamsfoundation.org)

## **Type of Grantmaker**

Independent foundation

## **Financial Data**

(yr. ended 2012-12-31)

Assets: \$134,908,398

Total giving: \$5,519,531

## **EIN**

046013680

## **990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## **Additional Contact Information**

Contact for questions regarding application process: Susan Perry: [sperry@hyamsfoundation.org](mailto:sperry@hyamsfoundation.org); (617) 426-5600 ext. 307

## **Background**

Established in 1929 in MA as the Sarah A. Hyams Fund; in 1991 merged with the Godfrey Hyams Trust and adopted current name.

Godfrey M. Hyams was born in Baltimore, Maryland, in 1859. As a child he moved with his family to Boston, where he graduated from Boston English High School and Harvard College. Metallurgist, engineer and financier, he was responsible for the growth of such companies as the Anaconda Mining Company. He also planned and managed the construction of the Virginia Railway, which made available large sources of bituminous coal to the eastern part of the United States. To assure that his money would be used for charitable purposes in perpetuity, Mr. Hyams established a charitable trust in 1921 to which the major portion of his estate was given upon his death in 1927. In 1929 the major distribution of assets was made by the estate of Godfrey M. Hyams to the Godfrey M. Hyams Trust. At that time the trustees organized two Massachusetts charitable corporations, the Sarah A. Hyams Fund and the Isabel F. Hyams Fund, and transferred approximately \$1,500,000 worth of securities to each of these two corporations. For many years the Godfrey M. Hyams Trust and the smaller Sarah A. Hyams Fund had identical trustees and grantmaking purposes and processes. During 1993, the trustees voted to merge the Trust into the Sarah H. Hyams Fund and rename it The Hyams Foundation, Inc. The trustees of The Hyams Foundation, Inc. also serve as trustees of the Isabel F. Hyams Fund, a public charity which devotes all of its income to operations in East Boston. The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

## **Limitations**

Giving primarily in Boston and Chelsea, MA.

No support for municipal, state, or federal agencies; institutions of higher learning for standard educational programs, hospitals and health centers, religious organizations for sectarian religious purposes; support for medical research is being phased out.

No grants to individuals, or for endowment funds, capital campaigns, fellowships, publications, conferences, films or videos or curriculum development.

## **Purpose and Activities**

The mission of the foundation is to increase economic, social justice and power within low-income communities. The foundation believes that investing in strategies that enable low-income people to increase their communities will have the greatest social return in these times. The foundation will carry out its mission by: supporting civic participation by low-income communities; promoting economic development that benefits low-income neighborhoods and their residents; and developing the talents and skills of low-income youth.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Affordable Housing: Community Organizing**

The foundation makes grants for related community organizing activities in order to increase the supply of affordable housing.

### **Affordable Housing: Production and Preservation**

The foundation has made a major commitment to increasing and preserving the supply of affordable rental housing and homeownership units, especially for very low-income families, in two ways: 1) through a special Request for Proposals (RFP) process in 2003 that resulted in a small number of three-year grants to community-based nonprofit housing producers that

have the expertise to bring housing production to a larger scale, need increased organizational capacity to do so and have available development opportunities and a complementary community organizing strategy; and 2) through a \$3 million Program Related Investment (PRI) loan to Home Funders, a collaborative funding initiative designed to create additional housing units for homeless and other very low-income families.

#### **Civic Engagement: Chelsea**

After extensive discussions with nonprofit organizations and public officials in Chelsea, MA, the foundation has developed a specific focus for its grantmaking in this city that it hopes will ultimately contribute to the academic and career success of Chelsea youth. The foundation believes that the achievement levels of youth in Chelsea can be enhanced by: 1) supporting the full and active participation of parents in shaping Chelsea's educational policies; 2) bringing together various constituencies within the community to create a shared vision of public education in Chelsea; and 3) working collaboratively to create an important new resource for Chelsea youth that increases their ability to achieve academic and career goals. The foundation will work with specific Chelsea organizations to pursue these three goals, beginning with an emphasis on parent organizing.

#### **Civic Engagement: Community Organizing**

Community organizing is a strategy that enables low-income community members to exercise their collective power to bring about positive change, gain social and political influence and help ensure equitable access to public and private resources. The foundation has found that community organizing that encompasses leadership development and public policy advocacy has the greatest potential for success. As a result, it will fund organizations that: 1) integrate organizing strategies with the development of community leaders and a clear public policy advocacy agenda that is determined by these leaders and other community members; and 2) focus on affordable housing, family economic self-sufficiency, and/or public education reform. Grants also will be made to: 1) coalitions of organizing groups that reflect these qualities and priorities; and 2) organizations that contribute added capacity to and are supported by these organizing groups.

#### **Civic Engagement: Leadership Development**

The foundation has made grants through two special funding initiatives that assist immigrants, refugees and other low-income people to become active leaders and participants in their communities and neighborhoods: 1) the Immigrant and Refugee Leadership Development Initiative; and 2) the Organizers of Color Initiative.

#### **Civic Engagement: Voter Participation**

In a democratic society, voting is a fundamental way for people to exercise their individual and collective power, ensuring that government is responsive to community needs. To achieve this goal, the foundation will continue its participation in the Boston Foundation's Civic Engagement Initiative, begun in 2002, and through a small number of direct grants that: 1) educate low-income people about voter registration and voting (consistent with the restrictions imposed on private foundations in this funding area); and 2) prepare refugees and immigrants to become citizens, voters and active members of their communities.

#### **Family Economic Self-Sufficiency: Community Organizing**

The foundation will also make grants for community organizing activities, in order to promote economic self-sufficiency for low-income individuals and families.

#### **Family Economic Self-Sufficiency: Workforce Development**

The foundation will focus on the critical role played by English language and basic adult literacy in enabling many adults to enter the workforce and advance to better paying jobs by targeting its direct grants to community-based English for Speakers of Other Languages (ESOL) and Adult Basic Education (ABE) programs. It will give priority to those that are: 1) reaching newer refugee and immigrant groups; 2) interested in improving program quality in order to become stronger candidates for public sector support; 3) using curricula and teaching methods that enhance critical thinking skills and involve students as both active learners and participants in the programs; and 4) increasing their integration and developing new and stronger collaborations with the larger educational and workforce development systems, so as to significantly increase their graduates' access to opportunities and services.

#### **Teen Development: Girls' Initiative**

The foundation makes two-year grants to community-based organizations providing comprehensive services to girls who have been or are under the jurisdiction of the Juvenile Court, the Department of Social Services, or the Department of Youth Services as a result of CHINS (Children in Need of Services) or delinquency. Selected grants also will be made to coalitions or organizations that contribute added capacity to and are supported by the Girls' Initiative grantees. Groups that believe they fit this criteria should submit a concept paper to the foundation (Attention: Ms. Sylvia R. Johnson, Assoc. Dir.). Concept papers will be reviewed on an ongoing basis.

#### **Teen Development: Internships/Apprenticeships and Youth Organizing**

The foundation will provide grants to community-based organizations that successfully foster the positive growth and development of teens by engaging them in skill-building and providing them with meaningful and rewarding opportunities to utilize, reflect upon and refine these skills in actual work and community environments. Priority will be given to applicants that: 1) serve teens ages 13-19; 2) provide connections to and support for the school success of teens involved; 3) support and motivate teens and have high expectations of them; 4) involve teens in program planning and decision-making; 5) provide a defined scope of work (e.g. contract) and compensation (e.g. stipend) for work performed and prepare teens for specific jobs, careers and successful workplace experiences; 6) teach youth leadership skills and provide specific opportunities to utilize these skills through community service, community education, advocacy, and/or organizing projects; and 7) engage youth on an ongoing basis and over a sustained period of time. Grants also will be made to: 1) coalitions of groups that meet the Internship/Apprenticeship and Youth Organizing criteria stated above; and 2) organizations that contribute added capacity to

and are supported by these organizations.

## Fields of Interest

### Subjects

- Adult/continuing education
- Civil rights, race/intergroup relations
- Community/economic development
- Family services
- Housing/shelter, development
- Human services
- Urban/community development
- Youth, services

### Population Groups

- African Americans/Blacks
- Asians/Pacific Islanders
- Disabilities, people with
- Economically disadvantaged
- Hispanics/Latinos
- Immigrants/refugees
- LGBTQ

## Geographic Focus

- Massachusetts

## Types of Support

- Continuing support
- General/operating support
- Matching/challenge support
- Mission-related investments/loans
- Program development
- Program-related investments/loans
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Grants list
- Informational brochure (including application guidelines)

## Application Information

Application form required.

Applicants should submit the following:

1. Population served
2. Geographic area to be served
3. Detailed description of project and amount of funding requested

Initial approach: Use online application system via foundation web site. Applicants who are unsure about whether their organization meets the foundation's funding priorities may send a 2-page letter of interest via e-mail

Copies of proposal: 1

Board meeting date(s): Mar., June, and Dec.

Deadline(s): Mar. 1, Sept. 2, and Dec. 2

Final notification: 3 to 4 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Godfrey M. Hyams‡
- Sarah A. Hyams‡

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Marti Wilson-Taylor \*, Chair.

Affiliation(s):

*Cloud Foundation, Board Member*

- Adam D. Seitchik \*, Treas.

Affiliation(s):

*Arjuna Capital, C.I.O.*

*Sustainable Investment Research Center, Founder*

- Iris Gomez \*, Clerk

Affiliation(s):

*Massachusetts Law Reform Institute, Attorney*

- Elizabeth B. Smith, Exec. Dir.

Affiliation(s):

*Associated Grant Makers, Inc., Member, Diversity Committee*

*Chaffin Education Fund, Tr.*

*Council on Foundations, Member, Independent Task Force*

- Wilma H. Davis

Affiliation(s):

*Handel and Haydn Society, Board Member*

- Lucas H. Guerra

Affiliation(s):

*Argus, Founder, Principal, and Creative Dir.*

*Governor's Human Trafficking Task Force, Member*

*Governor's Advisory Council on Immigration and Refugees, Other*

*Lesley University, Member, President's Advisory Council*

- M. Elena Letona

- Penn S. Loh

- Karen L. Mapp

Affiliation(s):

*Harvard University, Sr. Lecturer on Education, Graduate School of Education*

*Boston Principal Fellows Program, Faculty Member*

*Boston Teacher Residency Program, Faculty Member*

- Lily Mendez-Morgan

Affiliation(s):

*American Red Cross of Massachusetts, C.O.O.*

- Omar Simmons

Affiliation(s):

*Exaltare Capital Partners, Founder and Managing Dir.*

*Chestnut Hill School, Vice Chair.*

- Roslyn M. Watson

## **Staff**

### **Number of Staff**

6 full-time professional

2 full-time support

1 part-time support

### **Key Staff**

*Note: Does not include officers.*

- Angela Brown, Dir. of Progs.
- David Moy, Prog. Off., Civic Engagement
- Maria Mulkeen, Prog. Off., Affordable Housing
- Mark Paley, Dir., Admin. & Fin.
- R. Shani Pankam, Grants Mgr.
- Nahir Torres, Prog. Off., Teen Devel.

## **Memberships**

### **Regional Associations of Grantmakers**

- Associated Grant Makers

### **Affinity Groups**

- Asian Americans/Pacific Islanders in Philanthropy
- Association of Black Foundation Executives
- Grantmakers Concerned with Immigrants and Refugees
- Grantmakers for Children, Youth and Families

- Grantmakers for Education
- Mission Investors Exchange
- Neighborhood Funders Group
- New England Blacks in Philanthropy

#### **Associations and Other Philanthropic Organizations**

- Council on Foundations
- Greater Boston Funders for Women and Girls
- Massachusetts Council of Human Service Providers

#### **Financial Data**

Year ended 2012-12-31

Assets: \$134,908,398 (market value)

Expenditures: \$8,046,210

Total giving: \$5,519,531

Qualifying distributions: \$6,871,822

Giving activities include:

\$5,519,531 for 122 grants (high: \$150,000; low: \$300)

\$416,387 for 4 foundation-administered programs

#### **Online Communications**

- [Grantee Perception Report Highlights](#)
- [The Hyams Foundation, Inc.'s Philanthropy's Promise](#)

#### **Additional Location Information**

County: Suffolk

Metropolitan area: Boston-Cambridge-Quincy, MA-NH

Congressional district: Massachusetts District 08

## **Y & H Soda Foundation**

**Last Updated:** 2014-07-24

#### **At A Glance**

1635 School St.

Moraga, CA United States 94556-1150

Telephone: (925) 631-1133

Contact: Kappy Dye, C.F.O. and Grants Mgr.

Fax: (925) 631-0248

URL: [www.yhsodafoundation.org](http://www.yhsodafoundation.org)

#### **Type of Grantmaker**

Independent foundation

#### **Additional Descriptor**

- Celebrity: Business; Sports

#### **Financial Data**

(yr. ended 2012-12-31)

Assets: \$133,287,725

Total giving: \$4,812,125

#### **EIN**

941611668

#### **990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

#### **Additional Contact Information**

Information for grant inquiries: [Program-Assistant@yhsodafoundation.org](mailto:Program-Assistant@yhsodafoundation.org)

#### **Background**

Established in 1964.



Founded by the late Y. Charles "Chet" Soda and the late Helen C. Soda. Chet Soda was the first general partner of the Oakland Raiders. Long time residents of the East Bay, Helen C. Soda was a devoted wife and community leader. Mr. Soda initially was a cement contractor who later invested in a variety of business and property ventures. The Sodas were active in a variety of civic and philanthropic organizations and shared a special interest in education.

## **Limitations**

Giving limited to Alameda and Contra Costa Counties, CA.

No support for private foundations, or for partisan political activities.

No grants to individuals, or for annual fundraising campaigns, production of film/video or other media, faculty chairs, or for general fundraisers, benefits or events.

## **Purpose and Activities**

The foundation focuses grantmaking on four program areas: 1) Family Economic Success; 2) Community Organizing; 3) Immigration Legal Services; and 4) Urban Catholic Education.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Community Organizing**

The foundation envisions an East Bay where all people participate fully in civic life - in their schools, at their workplace, in their faith communities, and in their neighborhoods. The foundation believes community engagement is made possible when leaders from diverse groups are well trained and work together for the common good.

### **Family Economic Success**

The foundation believes in the dignity of work and the promise of upward economic mobility. Family Economic Success is made possible when low-income, underserved families are provided opportunities to stabilize their finances, earn a decent living, and save for the future. The two goals of the Family Economic Success program area are to: 1) help families to increase their incomes (income growth); and 2) help families to increase their assets (asset building)

### **Immigration Legal Services**

The foundation seeks to strengthen organizations that help newcomers achieve legal status in the community by providing citizenship and immigration legal services, a first step toward family economic success and civic engagement.

### **Urban Catholic Education**

This program is by invitation only. For nearly 20 years, the foundation has been deeply committed to Catholic elementary and high school education, especially for low income urban children and their families. As a crisis in Catholic education sweeps our nation and challenges our local schools and parishes, the foundation is shifting its strategy away from tuition assistance to a more proactive partnership with the Diocese of Oakland. The program's intention is to have a lasting impact on improving and sustaining Catholic schools that serve underserved urban communities.

## **Fields of Interest**

### **Subjects**

- Catholic agencies & churches
- Community/economic development
- Community/economic development, public policy
- Economic development
- Employment, training
- Financial services

### **Population Groups**

- Economically disadvantaged
- Immigrants/refugees

### **Geographic Focus**

- California

### **Types of Support**

- Continuing support
- General/operating support
- Management development/capacity building
- Program development
- Program evaluation
- Technical assistance

## **Application Information**

Program Asst. will steer potential applicants to appropriate Program Officer for application guidance.

Application form not required.

Initial approach: After ascertaining that program/organization is a geographic and programmatic fit, contact Prog. Asst. by e-mail or telephone to initiate a discussion regarding potential funding.

Board meeting date(s): 2nd Weds. of each month

Additional information: Applicant organizations must demonstrate the following: 1) Commitment to serving underserved populations; 2) Understanding of and tolerance towards cultural differences; 3) Sound organizational management.

## **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Y. Charles Soda Trust
- Y. Charles Soda‡
- Helen C. Soda‡

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Rosemary Soda \*, Chair.
- Robert Uyeki, C.E.O.
- Alfred Dossa \*, V.P. and Secy.
- Alan Holloway \*, V.P.
- Judith Murphy \*, V.P.
- Kappy Dye, C.F.O. and Grants Mgr.
- James Dye \*, Treas.
- Bob Uyeki, Exec. Dir.

## **Staff**

### **Number of Staff**

4 full-time professional

1 part-time support

### **Key Staff**

*Note: Does not include officers.*

- Aimee Durfee, Sr. Prog. Off.
- Mary Doyle, Prog. Off.
- Leslie Peterson, Grants and Admin. Asst.

## **Memberships**

### **Regional Associations of Grantmakers**

- Northern California Grantmakers

### **Affinity Groups**

- Asian Americans/Pacific Islanders in Philanthropy
- Asset Funders Network
- Bay Area Asset Funders Network
- FADICA
- Grantmakers Concerned with Immigrants and Refugees
- Grantmakers for Effective Organizations
- Mission Investors Exchange

## **Financial Data**

Year ended 2012-12-31

Assets: \$133,287,725 (market value)

Expenditures: \$8,322,274

Total giving: \$4,812,125

Qualifying distributions: \$5,878,533

Giving activities include:

\$4,812,125 for 180 grants (high: \$200,000; low: \$250)

## **Additional Location Information**

County: Contra Costa

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 11

## **Selected Grants**

The following grants are a representative sample of this grantmaker's funding activity:

- \$300,000 to Mujeres Unidas y Activas, San Francisco, CA, in 2012. For East Bay Organizing Program
- \$200,000 to Inner City Advisors, Oakland, CA, in 2012. For general operating support
- \$160,000 to Contra Costa Interfaith Sponsoring Committee, Richmond, CA, in 2012. For general operating support
- \$150,000 to Rubicon Programs, Richmond, CA, in 2012. For general operating support
- \$100,000 to Earned Assets Resource Network, San Francisco, CA, in 2012. For East Bay Asset Building
- \$98,500 to International Institute of the Bay Area, San Francisco, CA, in 2012. For Immigration Legal Services for Oakland and Antioch
- \$80,000 to Cypress Mandela Training Center, Oakland, CA, in 2012. For general operating support
- \$60,000 to Immigrant Legal Resource Center, San Francisco, CA, in 2012. For East Bay Naturalization Collaboration

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## Community Foundation of St. Joseph County

**Last Updated:** 2013-09-19

### At A Glance

205 W. Jefferson Blvd., Ste. 610 , P.O. Box 837  
South Bend, IN United States 46624-0837  
Telephone: (574) 232-0041  
Contact: Angela Butiste, Sr. Prog. Off.  
Fax: (574) 233-1906  
E-mail: [info@cfsjc.org](mailto:info@cfsjc.org)  
URL: [www.cfsjc.org](http://www.cfsjc.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2013-06-30)  
Assets: \$132,335,082  
Total giving: \$4,496,454

### EIN

237365930

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Additional e-mail: [angela@cfsjc.org](mailto:angela@cfsjc.org); Grant application e-mail: [grants@cfsjc.org](mailto:grants@cfsjc.org)

### Background

Established in 1991 in IN.

### Limitations

Giving limited to St. Joseph County, IN.

No support for religious organizations for religious purposes, or development or public relations activities.

No grants to individuals (except for scholarships), or for endowment campaigns, retirement of debts, camperships, annual appeals or membership contributions, travel, post-event or after the fact situations, or computers (unless presented as a necessary component of larger program or objective).

### Purpose and Activities

The foundation seeks to improve the quality of life for the citizens of St. Joseph County and their succeeding generations.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### African-American Community Fund Grants

African American Community Fund grants are to nonprofit organizations with programs that enhance the lives of African Americans in St. Joseph County. Grant deadlines are Mar. 1 and Oct. 1; see web site for more information.

#### ArtsEverywhere Fund Grants

The goals of the ArtsEverywhere Fund are to: 1) raise artistic quality; 2) strengthen volunteer and staff leadership; 3) enhance the capacity of arts organizations and the arts community; 4) foster and support local talent; and 5) inspire community pride. St.

Joseph County nonprofit or public agencies with a demonstrated, substantial (though not necessarily exclusive) commitment to the arts as part of its overall mission and appropriate participation in the ArtsEverywhere initiative are eligible to apply for grant funding. Grants will be competitively awarded in the following categories: 1) capacity building; 2) program or project support; and 3) major venture funding. Deadlines are May 1 and Nov. 1 of each year; see web site for more information.

### **Leighton Award for Nonprofit Excellence**

The Leighton Award for Nonprofit Excellence is intended to celebrate, reward and encourage achievement in the charitable sector. Each year, this \$100,000 endowment challenge grant will be awarded competitively to a St. Joseph County nonprofit demonstrating superior leadership, management, and programming. Intent to Apply: No later than June 1 of each year; see web site for more information.

### **Robert P. and Clara I. Milton Fund for Senior Housing**

The purpose of this fund is to support innovative programs focusing on issues related to senior housing. Projects will be considered that look to make a meaningful impact while promoting dignity, independence and quality of life. Charities that are dedicated to meeting senior housing and related needs are encouraged to apply for funding. Application deadlines are May 1 and Nov. 1; see web site for more information.

### **Scholarship Programs**

The foundation has more than 50 scholarship funds which awards over \$450,000 to local students each year. The scholarships were established for a variety of reasons-to assist low-income students, encourage children of employees to pursue their dreams, or train medical professionals, teachers, and engineers. Many were established in memory of lost loved ones, turning grief into tribute and helping students achieve their goals in the process. Each scholarship has unique eligibility requirements and application guidelines. See web site for additional information.

### **Special Projects Challenge Grants**

The Special Project Challenge Grant process encourages projects in the following areas: 1) community development and urban affairs; 2) health and human services; 3) parks, recreation and environment; and 4) youth and education. Deadlines are Mar. 1 and Oct. 1, see foundation web site for more information.

## **Fields of Interest**

### **Subjects**

- Arts
- Community development, neighborhood development
- Education
- Health care
- Higher education
- Human services
- Recreation
- Recreation, parks/playgrounds

### **Population Groups**

- Youth

### **Geographic Focus**

- Indiana

### **Types of Support**

- Building/renovation
- Capital campaigns
- Equipment
- Management development/capacity building
- Matching/challenge support
- Scholarships--to individuals

### **Publications**

- Application guidelines
- Financial statement
- Grants list
- Newsletter

## **Application Information**

Visit foundation web site for application Cover Sheet and guidelines.

Application form required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Results expected from proposed grant

3. Statement of problem project will address
4. Name, address and phone number of organization
5. Copy of IRS Determination Letter
6. How project's results will be evaluated or measured
7. Listing of board of directors, trustees, officers and other key people and their affiliations
8. Detailed description of project and amount of funding requested
9. Contact person
10. Copy of current year's organizational budget and/or project budget

Initial approach: E-mail Grant Cover Sheet and attachments

Copies of proposal: 1

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): Varies

Final notification: Varies

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Nancy King \*, Chair.
- Timothy Sexton \*, Vice-Chair.
- Rose Meissner \*, C.E.O. and Pres.
- Anita Echevarria, V.P., Admin.
- Christopher Nanni, V.P., Prog.
- Jo Ann Wittenbach \*, Secy.
- Jeffrey Costello \*, Treas.
- John S. Abernethy
- Brad Beutter
- Pamela Burish
- Dr. Virginia Calvin
- Richard Currey
- Linda Doshi
- Mary Downes
- Patricia Hackett
- Mary Jan Hedman
- Vincent Henderson
- Nancy Ickler
- Marcia Jones
- Christopher Karam
- James Keenan
- Joseph Kernan
- Greta Roemer Lewis
- Tina Patton
- Richard Pfeil
- Jeffrey Rea
- Daniel Smogor

## **Staff**

### **Number of Staff**

8 full-time professional

### **Key Staff**

*Note: Does not include officers.*

- Emily Addis, Prog. Off.
- Amy Bradburn, Admin. Asst.
- Angela Butiste, Sr. Prog. Off.
- Mary Wadsworth, Staff Acct.
- Laura Moran Walton, Dir., Public Rels. and Comms.

## **Memberships**

### **Regional Associations of Grantmakers**

- Indiana Grantmakers Alliance

### **Associations and Other Philanthropic Organizations**

- Council on Foundations

## **Financial Data**

Year ended 2013-06-30

Assets: \$132,335,082 (market value)

Gifts received: \$6,080,385

Expenditures: \$5,949,132

Total giving: \$4,496,454

Qualifying distributions: \$4,903,014

Giving activities include:

\$4,246,419 for grants

\$250,035 for grants to individuals

\$4,903,014 for foundation-administered programs

## Online Communications

- [YouTube](#)
- [Knowledge Center](#)

## Additional Location Information

County: St. Joseph

Metropolitan area: South Bend-Mishawaka, IN-MI

Congressional district: Indiana District 02

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$359,383 to South Bend Symphony Orchestra, South Bend, IN, in 2011. For unrestricted support, ArtsEverywhere Series, MLK Day Celebration
- \$250,000 to Family Connection of Saint Joseph County, South Bend, IN, in 2011. For early childhood initiative
- \$112,125 to Foundation of Saint Joseph Regional Medical Center, South Bend, IN, in 2011. For unrestricted support, scholarship
- \$98,969 to Center for the Homeless, South Bend, IN, in 2011. For unrestricted support
- \$74,225 to University of Notre Dame, Notre Dame, IN, in 2011. For charitable initiatives
- \$60,000 to University of Notre Dame, Notre Dame, IN, in 2012. To expand outreach of Robinson Shakespeare Company to schools within South Bend Community School Corporation, include afterschool program in class collaborative teaching and professional development for teachers
- \$57,500 to Real Services of Saint Joseph County, South Bend, IN, in 2012. To continue to build Care Transition model in collaboration with Saint Joseph Regional Medical Center
- \$45,000 to Housing Authority of the City of South Bend, South Bend, IN, in 2011. For Lead Abatement Program
- \$27,170 to Michiana Public Broadcasting Corporation, South Bend, IN, in 2011. For unrestricted support, Center for Public Media Wall of Helping Hands, Leighton Award Special Recognition
- \$25,000 to La Casa de Amistad, South Bend, IN, in 2011. For program support
- \$20,000 to CASIE Center, South Bend, IN, in 2011. For Establishment of Child-Friendly Medical Clinic
- \$20,000 to South Bend Civic Theater, South Bend, IN, in 2012. For season support
- \$18,480 to Saint Marys College, Notre Dame, IN, in 2011. For unrestricted support, scholarships
- \$13,434 to Logan Community Resources, South Bend, IN, in 2012. To purchase new furniture for Logan's group living homes
- \$10,000 to Fischhoff National Chamber Music Association, Notre Dame, IN, in 2012. For free community outreach programs for children and youth presented by Fischhoff Competition alumni and local professional musicians
- \$5,000 to Michiana Public Broadcasting Corporation, South Bend, IN, in 2012. To experience Michiana new daily show, airing at 6:30 pm on WNIT and 8:00 pm on InFocus Monday through Friday
- \$5,000 to Musical Arts Indiana, IN, in 2012. For three concerts of the Vesper Chorale during 20th Anniversary season
- \$4,000 to Mainstage Theater Company, Eugene, OR, in 2012. For production of Broadway musical Legally Blonde
- \$2,500 to South Bend Jazz Festival, IN, in 2012. For free public stage part of European-style jazz festival to be held in conjunction with Art Beat
- \$1,500 to Good Shepherd Montessori School, South Bend, IN, in 2012. For outdoor sculpture project for students grades 1-8 bird sculpture will be constructed step-by-step by students with assistance of local artists who act as artist-in-residence

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## FINCA International, Inc.

Last Updated: 2012-05-07

### At A Glance

1101 14th St., N.W., 11th Fl.

Washington, DC United States 20005-5637

Telephone: (202) 682-1510

Fax: (202) 682-1535

E-mail: [info@finca.org](mailto:info@finca.org)

URL: [www.finca.org](http://www.finca.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Celebrity: Business
- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2011-12-31)

Assets: \$130,491,826

Total giving: N/A

## EIN

133240109

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 1984 in NY.

Founded by Dr. John Hatch, an economic development expert who is most well-known for developing village banking systems in the developing world, allowing individuals who would not otherwise have access to credit the opportunity to develop self-sufficiency.

## Limitations

Giving on an international basis.

## Purpose and Activities

The organization's mission is to provide financial services to the world's lowest-income entrepreneurs so they can create jobs, build assets, and improve their standard of living.

## Fields of Interest

### Subjects

- Financial services
- International economic development

## Geographic Focus

- International

## Types of Support

- Loans--to individuals

## Publications

- Annual report
- Financial statement

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- John T. Archer
- Margaret Little
- Million Dollar Round Table Foundation
- The Osprey Foundation
- Ostara Foundation
- Pam Phelan
- Alpern Family Foundation
- Dennis M. Berryman
- Brewester Foundation
- Suzette J. Clayton

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert W. Hatch \*, Chair.  
Affiliation(s):  
*Cereal Ingredients, Inc., Chair. and C.E.O.*  
*CII Laboratory Services, C.E.O. and Board Member*  
*Maverick Converting, C.E.O. and Board Member*  
*Healthy Back Store, Board Member*
- Rupert Scofield \*, Pres., C.E.O., and Exec. Dir.
- Dr. John Hatch \*, Secy.
- Richard Williamson \*, Treas.
- H.M. Queen Raina Al-Abdullah  
Affiliation(s):  
*Jordan River Foundation, Chair.*  
*Better World Fund, Tr.*  
*International Youth Foundation, Dir.*  
*United Nations Foundation, Dir.*  
*UNICEF, Eminent Global Advocate for Children*
- Carlos Camacho
- John Elkins  
Affiliation(s):  
*McKinsey & Company, Sr. Advisor*  
*United Nations, Member, Advisory Board for Inclusive Financial Svcs.*  
*World Economic Forum, Member, Exec. Comm. for Travel and Tourism*  
*World Travel and Tourism Council, Member, Exec. Comm.*
- JoAnn Field  
Affiliation(s):  
*Women in Philanthropy, Member*  
*Board of Network Rehabilitative Services for the Mentally Ill in Missouri, V.P.*  
*National Association for Mental Illnesses, Board Member*
- Michael Green
- Shawn Hassel  
Affiliation(s):  
*Alvarez and Marsal, LLC, Managing Dir.*  
*Turnaround Management Association, Member*  
*Association of Insolvency and Restructuring Advisors, Member*  
*American Bankruptcy Institute, Member*
- Soledad DeLeon Hurst  
Affiliation(s):  
*The Roundabout Theater, Board Member*  
*Auborn Theological Seminary, Member, Media Grp.*
- Harold D. Jastram, Esq.  
Affiliation(s):  
*Oppenheimer Wolff & Donnelly, Partner*  
*American Bar Association, Member*  
*Minnesota State Bar Association, Member*
- Paul LeFort  
Affiliation(s):  
*People's Resource Center Board, Member*  
*TRIZETTO, Lead Independent Dir.*
- Agrina Mussa  
Affiliation(s):  
*Classic Designs Limited, Managing Dir.*  
*Technical Committee on Development of Trade and Industrial Policy for Malawi, Member*
- James Semakkadde  
Affiliation(s):  
*Makerer University, Lecturer*
- Rita Spillman  
Affiliation(s):  
*SH Productions, Inc., Pres. and C.E.O.*
- David E. Weisman  
Affiliation(s):  
*Mountain Union Telecom, LLC, Pres. and C.E.O.*



*InSite Wireless, LLC, Chair.*  
*Shulman, Rogers, Gandal, Pordy, &*  
*Ecker, Member*  
*Federal Communications Bar Association, Member*  
*American Bar Association, Member*  
*Parkmont School, Dir.*

## Financial Data

Year ended 2011-12-31

Assets: \$130,491,826 (market value)

Gifts received: \$25,743,712

Expenditures: \$44,140,303

Total giving: N/A

Qualifying distributions: N/A

## Online Communications

- [MySpace](#)
- [YouTube](#)
- [LinkedIn](#)
- [Twitter](#)
- [Facebook](#)

## Additional Location Information

County: District of Columbia

Metropolitan area: Washington-Arlington-Alexandria, DC-VA-MD-WV

Congressional district: District of Columbia District At-large

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## South Dakota Community Foundation

**Last Updated:** 2014-01-13

### At A Glance

1714 North Lincoln Ave. , P.O. Box 296

Pierre, SD United States 57501

Telephone: (605) 224-1025

Contact: Stephanie Judson, Pres.

Fax: (605) 224-5364

E-mail: [stephj16@sdcommunityfoundation.org](mailto:stephj16@sdcommunityfoundation.org)

URL: [www.sdcommunityfoundation.org](http://www.sdcommunityfoundation.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2011-12-31)

Assets: \$128,325,460

Total giving: \$4,230,715

### EIN

460398115

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Additional tel.: (800) 888-1842

### Background

Incorporated in 1987 in SD.

### Limitations

Giving limited to SD.

No grants to individuals (except for scholarships), or for operating expenses; no loans.

## **Purpose and Activities**

The foundation seeks to promote philanthropy, receive, and administer charitable gifts and invest in a wide range of programs promoting the social and economic well-being of the people of SD.

## **Fields of Interest**

### **Subjects**

- Arts
- Community/economic development
- Economic development
- Education
- Health care
- Health organizations, association
- Human services
- Public affairs, citizen participation
- United Ways and Federated Giving Programs
- Youth development, citizenship

### **Population Groups**

- Economically disadvantaged
- Minorities
- Native Americans/American Indians

## **Geographic Focus**

- South Dakota

## **Types of Support**

- Building/renovation
- Capital campaigns
- Curriculum development
- Endowments
- Income development
- Matching/challenge support
- Publication
- Research
- Scholarships--to individuals
- Seed money
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure
- Newsletter
- Program policy statement

## **Application Information**

Visit foundation web site application guidelines.

Application form required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Signature and title of chief executive officer
3. Results expected from proposed grant
4. Qualifications of key personnel
5. Statement of problem project will address
6. Name, address and phone number of organization
7. Copy of IRS Determination Letter
8. Copy of most recent annual report/audited financial statement/990
9. How project's results will be evaluated or measured
10. Listing of board of directors, trustees, officers and other key people and their affiliations
11. Detailed description of project and amount of funding requested
12. Plans for cooperation with other organizations, if any
13. Contact person

14. Organization's charter and by-laws
15. Copy of current year's organizational budget and/or project budget
16. Listing of additional sources and amount of support
17. Timetable for implementation and evaluation of project

Initial approach: Complete eGrant Letter of Inquiry

Copies of proposal: 1

Board meeting date(s): May and Nov.

Deadline(s): None

Final notification: Within 15 business days for letter of inquiry decision; 45-60 days for grant notification

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Al Kurtenbach \*, Chair.
- Stephanie Judson, Pres.
- Patricia Adam
- David Anderson
- Beth Benning
- Bruce Brandner
- Muffy Christen
- Dale Christensen
- Janet B. Cronin
- Jeff Erickson
- Charles Hart
- Jim Hart
- Blake Hoffman
- Trudy Morgan
- Steve Myers

Affiliation(s):

*South Dakota Investment Council, Chief Investment Off. and Sr. Advisor*

- Anita Nachtigal
- Stanley Porch
- John Porter
- Norbert Sebade
- Peg Seljeskog
- Curt Wischmeier

## Staff

### Number of Staff

2 full-time professional

1 part-time professional

1 full-time support

### Key Staff

*Note: Does not include officers.*

- Clay Cudmore, Acct.
- Ginger Niemann, Prog. Off.
- Buddy Seiner, Community Savings Account Coord.

## Memberships

### Affinity Groups

- Exponent Philanthropy
- Grantmakers for Effective Organizations

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2011-12-31

Assets: \$128,325,460 (market value)

Gifts received: \$8,569,763

Expenditures: \$5,217,040

Total giving: \$4,230,715

Qualifying distributions: \$4,230,715

Giving activities include:  
\$4,015,552 for 71 grants (high: \$707,066  
\$215,163 for grants to individuals

### **Additional Location Information**

County: Hughes

Congressional district: South Dakota District At-large

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## **United Way of Central Indiana**

**Last Updated:** 2014-03-11

### **At A Glance**

3901 N. Meridian St. , P.O. Box 88409  
Indianapolis, IN United States 46208-4042  
Telephone: (317) 923-1466  
Contact: Ann D. Murtlow, Pres. and C.E.O.  
Fax: (317) 921-1355  
E-mail: [community@uwci.org](mailto:community@uwci.org)  
URL: [www.uwci.org](http://www.uwci.org)

### **Type of Grantmaker**

Public charity

### **Additional Descriptor**

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### **Financial Data**

(yr. ended 2012-06-30)  
Assets: \$128,181,539  
Total giving: \$47,872,358

### **EIN**

351007590

### **990**

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2001](#)

### **Background**

Established in 1921 in IN.

### **Limitations**

Giving limited to Boone, Hamilton, Hancock, Hendricks, Marion, and Morgan counties, IN.

### **Purpose and Activities**

The mission of the organization is to sustain vital human services for those who need help most while reducing such needs for future generations.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Personal Renewal Experiences Fund**

Funds are available to individuals working in the human services industry for a personal renewal experience, and to allow for opportunities for the organization to 'fill the void' created by the individual's absence from their job during this experience. Funds received for this purpose are considered taxable income.

#### **Ruth Lilly Philanthropic Foundation Grant**

Grants up to \$50,000 are available to local human service organizations that deliver programs that work towards the following community outcomes: freedom from abuse, neglect, and victimization; access to temporary and emergency assistance; opportunities for optimum physical health; high levels of independence for older adults; social and emotional well-being through community engagement; development of successful life-skills and capabilities in youth; improved individual and family support for those involved with the juvenile justice system; maintaining a critical social service web; and improving quality of life for all members of a community. Eligible organizations need not be affiliated with United Way.

#### **Transition-in-Place Program for Homeless Families**

Funding is available to qualified organizations to establish a Transition-in-Place program to serve homeless families in the Indianapolis metropolitan area. The Transition-in-Place program is a permanent housing program model in which homeless families obtain housing in the community through a lease in their own name while receiving supporting services and rental assistance for a specified duration of time. Unlike traditional transitional housing models which require individuals to move after two years, this program has been shown to be a better, most cost-effective approach for some families to achieve housing stability. Applicant organizations must: have been in existence for two or more years; have a direct relationship with the family emergency shelter system; have experience in successfully working with homeless families using a Housing First/Housing plus model; have the capacity to match service funding with rental subsidies; and have maintained fiscal accountability, including conducting an independent audit, within the last two years. Applicant agencies are not required to be United Way partner agencies.

### **United Christmas Service**

Donated gifts (including food, clothing, and toys) are available to low-income individuals and families for the holiday season. Applicants can be referred by caseworkers from partner organizations, or apply individually for support; those who are referred will receive preference.

### **Winter Assistance Fund**

Emergency funding is available to individuals and families who are unable to pay their heating bills during the winter months, and are not eligible for government energy assistance programs. This program runs from January until May.

## **Fields of Interest**

### **Subjects**

- Child development, education
- Children, foster care
- Education, reading
- Housing/shelter, services
- Human services

### **Geographic Focus**

- Indiana

### **Publications**

- Application guidelines
- Annual report

## **Application Information**

Application form not required.

Deadline(s): Feb. 15 for Transition-in-Place Program for Homeless Families; May 30 for Ruth Lilly Philanthropic Foundation Grant; Dec. 4 for United Christmas Service

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Samuel L. Odle \*, Chair.
- Steven F. Walker \*, Chair-Elect.
- Ann D. Murtlow \*, Pres. and C.E.O.
- Angela Dabney \*, Sr. V.P., Resource Devel.
- Dale DePoy \*, Sr. V.P., Opers.
- Jay Geshay \*, Sr. V.P., Community Planning and Strategic
- Chris Herndon \*, V.P., Strategic Mktg. and Comm.
- Kennethe Vaughn \*, V.P., Talent Mgmt. and Diversity
- Maria M. Quintana \*, Secy.
- Gordon Slack \*, Treas.

Affiliation(s):

*Dow AgroSciences LLC, Member*

- Gina Miller \*, C.F.O.
- R. James Alerding

Affiliation(s):

*Clifton Gunderson, LLP, Member*

- Michael J. Alley

Affiliation(s):

*Patriot Investments LLC, Member*

- Sue A. Back

Affiliation(s):

*RJ Pile, LLC, Member*

- Robert C. Ballard

Affiliation(s):  
*Sallie Mae, Member*

- Charles R. Bantz  
Affiliation(s):  
*Indiana University - Purdue University Indianapolis, Member*
- Michael R. Becher  
Affiliation(s):  
*Deloitte LLP, Member*
- Tanya Bell  
Affiliation(s):  
*Indiana Black Expo, Inc., Member*
- Gerald L. Bepko  
Affiliation(s):  
*Indiana University, Member*
- Kathryn G. Betley
- Betsy Bikoff  
Affiliation(s):  
*Richard M. Fairbanks Foundation, Inc., Member*
- Vincent C. Caponi  
Affiliation(s):  
*St. Vincent Health, Member*
- Matthew A. Cohoat  
Affiliation(s):  
*Duke Realty Corporation, Member*

## Financial Data

Year ended 2012-06-30

Assets: \$128,181,539 (market value)

Gifts received: \$65,178,818

Expenditures: \$61,259,017

Total giving: \$47,872,358

Qualifying distributions: N/A

Giving activities include:

\$46,008,042 for 253 grants (high: \$2,005,502; low: \$5,029)

\$1,864,316 for grants to individuals

## Online Communications

- [Facebook](#)
- [YouTube](#)
- [Twitter](#)
- [Blog](#)
- [Flickr](#)

## Additional Location Information

County: Marion

Metropolitan area: Indianapolis-Carmel, IN

Congressional district: Indiana District 07

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## Care Foundation

**Last Updated:** 2012-11-23

### At A Glance

800 Founders Park Dr.

Springdale, AR United States 72762-8334

Telephone: (479) 361-4624

Contact: b Anita Scism, Pres. and C.E.O.

Fax: (479) 361-5094

E-mail: [anita@endeavorfoundation.net](mailto:anita@endeavorfoundation.net)

URL: [endeavorfoundation.net/our-funds](http://endeavorfoundation.net/our-funds)

### Type of Grantmaker

Public charity

## Additional Descriptor

- Supporting organization

## Financial Data

(yr. ended 2011-12-31)

Assets: \$127,029,067

Total giving: \$3,266,209

## EIN

710255776

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 2000 in AR; converted from the sale of Northwest Health System to Quorum Health Resources (now Triad Hospitals); supporting organization of Northwest Arkansas Community Foundation.

## Limitations

Giving primarily in Benton and Washington counties, AR.

## Purpose and Activities

The foundation's mission is to enrich the quality of life in Washington and Benton counties of northwest Arkansas by: supporting the Northwest Arkansas Community Foundation; serving as a leader, catalyst, and resource for other nonprofit organizations in northwest Arkansas; building a permanent endowment for future community needs; and promoting healthy communities through strategic grantmaking.

## Fields of Interest

### Subjects

- Education
- Elementary school/education
- Health care
- Mental health, treatment
- Philanthropy/voluntarism
- Secondary school/education

### Population Groups

- Immigrants/refugees

## Geographic Focus

- Arkansas

## Types of Support

- Income development
- Management development/capacity building
- Program development
- Program evaluation

## Application Information

Unsolicited requests for funds not considered or acknowledged; all applications are by invitation only.

Application form not required.

Board meeting date(s): Every other month

## Officers

- Dennis Smiley \*, Chair.
- Anita Scism \*, Pres. and C.E.O.
- Lisa Ray \*, Vice-Chair.
- Charles Rateliff \*, Treas.
- Lisa McCullough \*, C.F.O. and C.O.O.

## Directors

- Julie Davis

- Alan Dranow
- Susan Duke
- Debi Havner
- Mauricio Herrera

## Memberships

### Regional Associations of Grantmakers

- Southeastern Council of Foundations

### Affinity Groups

- Grantmakers for Education
- Mission Investors Exchange

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2011-12-31

Assets: \$127,029,067 (market value)

Gifts received: \$168,866

Expenditures: \$4,802,911

Total giving: \$3,266,209

Qualifying distributions: N/A

Giving activities include:

\$3,266,209 for 14 grants (high: \$510,165; low: \$33,750)

## Additional Location Information

County: Washington

Metropolitan area: Fayetteville-Springdale-Rogers, AR-MO

Congressional district: Arkansas District 03

## S. H. Cowell Foundation

**Last Updated:** 2014-01-30

### At A Glance

595 Market St., Ste. 950

San Francisco, CA United States 94105-2816

Telephone: (415) 397-0285

Contact: Lise Maisano, V.P., Grant Progs.

Fax: (415) 986-6786

URL: [www.shcowell.org](http://www.shcowell.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$125,826,180

Total giving: \$3,699,935

### EIN

941392803

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Established in 1956 in CA.

A businessman and philanthropist, S.H. Cowell was president of the Henry Cowell Lime and Cement Company, which was founded by his father, Henry Cowell. The foundation was established through a bequest from S.H. Cowell.

### Limitations



Giving limited to Northern and Central California.

No support for projects restricted to people with specific medical, physical, or health conditions, daycare centers, drug or alcohol abuse programs, environmental or conservation programs, medical service projects, political lobbying, population programs, post-secondary education, projects that are the responsibility of government agencies (except for school districts), or sectarian, politically partisan, or religious projects.

No grants to individuals, or for special events conferences, books, films, videos, academic or medical research.

## **Purpose and Activities**

The goal of the foundation is to improve the quality of life of children and families living in Northern and Central California by making grants that directly support and strengthen children, families, and the neighborhoods where they live. Priority is given to communities where Cowell has made, or could make, place-based complementary grants in Northern and Central California towns and neighborhoods where there is widespread and acute poverty and there are strong working relationships among residents and institutional leaders. The foundation funds efforts to increase a town or neighborhood's capacity to engage and serve its low-income families. These guidelines apply across all program areas: Family Resources Centers, K-12 Public Education, Responsive, Youth Development and affordable Housing.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Affordable Housing Grants**

Proposed projects must involve increasing the number of affordable homes for low-income families in a given community. In addition, funding is focused in communities that Cowell already supports through its other main program areas (Family Resource Centers, K-12 Public Education, and Youth Development). Proposals are considered for: Construction, preservation and rehabilitation of family housing; predevelopment working capital, including planning, land acquisition, and architectural design; helping communities develop policies that support increasing the number of affordable homes; community spaces in affordable housing developments that provide activities for families, after-school spaces, and computer labs. For more information visit the foundation's web site.

### **Education Grants**

Proposed projects must benefit public elementary and secondary schools (K-12) that serve a significant number or portion of students in a given community. The foundation makes two general types of grants: 1) Grants to school districts; and 2) Grants to education resource organizations that work with schools and school districts. The majority of Cowell grants support the induction and professional development of teachers to help schools develop effective, coherent and responsive instructional programs. The program also fund projects that support students' learning by strengthening connections among schools, families and other agencies in the community, and projects that link classroom lessons to carefully aligned and structured programs beyond the school. For more information visit the foundation's web site.

### **Family Resource Center Grants**

Proposed projects must involve the establishment a new FRC or strengthening an existing one. All FRC projects seeking support must demonstrate potential for long-term sustainability and documented success at helping to improve the well-being of children, families and communities. For more information visit the foundation's web site.

### **Responsive Category**

Responsive grants are typically available to communities that already receive support from the foundation and have a critical need or unique circumstances which fall beyond the parameters of the foundation's program priorities. For more information visit the foundation's web site.

### **Youth Development Grants**

Proposed projects must involve launching a new program or strengthening an existing one. This might include improving the quality of existing programs, increasing access to high-quality programs so they have a greater impact in a specific neighborhood, or increasing the capacity of proven organizations so that successful programs can be sustained over the long-term. For more information visit the foundation's web site.

## **Fields of Interest**

### **Subjects**

- Education
- Housing/shelter
- Human services
- Youth development

### **Population Groups**

- African Americans/Blacks
- Asians/Pacific Islanders
- Boys
- Children
- Children/youth
- Economically disadvantaged
- Girls

- Hispanics/Latinos
- Infants/toddlers
- Minorities
- Native Americans/American Indians
- Youth

## Geographic Focus

- California

## Types of Support

- Building/renovation
- Capital campaigns
- Consulting services
- Curriculum development
- Emergency funds
- Equipment
- General/operating support
- Land acquisition
- Management development/capacity building
- Matching/challenge support
- Mission-related investments/loans
- Program development
- Program-related investments/loans
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Financial statement
- Grants list
- Occasional report
- Program policy statement
- Program policy statement (including application guidelines)

## Application Information

Applicants should submit the following: 1. Brief history of organization and description of its mission 2. Geographic area and population to be served 3. Detailed description of project and amount of funding requested 4. Timetable for implementation and evaluation of project 5. Results expected from proposed grant 6. Copy of most recent annual report/audited financial statement 7. Board of Directors Roster 8. Budget for proposed workflow 9. Copy of IRS 501 (c) (3) Determination Letter.

Application form not required.

Initial approach: Visit foundation web site, then telephone inquiry

Copies of proposal: 1

Board meeting date(s): Five times a year

Deadline(s): None

Final notification: 3 to 6 months

Additional information: If the project is of interest to the foundation, additional information may be requested. The foundation will usually arrange a site visit. Communication with directors is discouraged.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- S.H. Cowell‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Ann Alpers \*, Pres.  
Affiliation(s):  
*Akin Gump Strauss Hauer & Feld, Sr. Counsel*
- Don Roberts, Secy. and Genl. Counsel  
Affiliation(s):  
*Thelen Reid & Priest LLP, Of Counsel*

- Dr. Lisa Backus
  - Charles E. Ellwein
  - Dr. Mikiko Huang
  - Scott Mosher
- Affiliation(s):  
Anilix, Inc., V.P.
- Lydia Tan
  - Kim Thompson

## Staff

### Number of Staff

7 full-time professional

4 part-time professional

### Key Staff

*Note: Does not include officers.*

- Jamie Allison-Hope, Sr. Prog. Off., Youth Devel., Housing
- Darryl Campbell, Accounting Specialist
- Ken Doane, Prog. Dir., Educ.
- Cynthia Farley, Admin. Asst.
- Anna Hernandez, Grants Asst.
- Samuel Israel, Database Mgr.
- Anna Luna, Grant Asst.
- Lise Maisano, V.P., Grant Progs.

## Memberships

### Regional Associations of Grantmakers

- Northern California Grantmakers

### Affinity Groups

- Grantmakers for Children, Youth and Families
- Grantmakers for Education
- Grantmakers for Effective Organizations
- Mission Investors Exchange

## Financial Data

Year ended 2012-12-31

Assets: \$125,826,180 (market value)

Expenditures: \$6,348,536

Total giving: \$3,699,935

Qualifying distributions: \$5,265,338

Giving activities include:

\$3,699,935 for 86 grants (high: \$266,000; low: \$1,000)

## Online Communications

- [Strategic Plan 2009-2019](#)
- [Grants In Action](#)
- [Grantee Perception Report](#)
- [Grants Database](#)

## Additional Location Information

County: San Francisco

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$266,000 to Sanger Unified School District, Sanger, CA, in 2012. To sustain collaborative improvement and increase the intellectual rigor of instruction
- \$240,000 to California School-Age Consortium, Oakland, CA, in 2012. For California School-Age Consortium to create EL-focused professional development training for after school staff
- \$195,000 to Redwood City School District, Redwood City, CA, in 2012. To sustain and expand collaboration among schools serving North Fair Oaks
- \$150,000 to United Way of the Bay Area, San Francisco, CA, in 2012. For SparkPoint Centers in East Oakland, Bay

Point/East Contra Costa and Solano County

- \$115,000 to On The Move, Napa, CA, in 2012. For operating support for the McPherson Family Resource Center
  - \$100,000 to On The Move, Napa, CA, in 2012. To continue the Leadership Academy in the McPherson neighborhood
  - \$75,000 to Businesses United in Investing, Lending and Development, Redwood City, CA, in 2012. To strengthen the youth entrepreneurship program
  - \$75,000 to San Francisco Unified School District, San Francisco, CA, in 2012. To accelerate learning for long-term English Learners in Excelsior neighborhood schools
  - \$60,000 to Asian Womens Shelter Project, San Francisco, CA, in 2012. For operating support
  - \$25,000 to Girls Inc. of Alameda County, San Leandro, CA, in 2012. For the purchase and renovation of a new building in downtown Oakland
- 

## The Zellerbach Family Foundation

**Last Updated:** 2014-06-05

### At A Glance

(formerly The Zellerbach Family Fund)

575 Market St., Ste. 2950

San Francisco, CA United States 94105-2854

Telephone: (415) 421-2629

Contact: Allison Magee, Exec. Dir.

Fax: (415) 421-6713

E-mail: [info@zellerbachfamilyfoundation.org](mailto:info@zellerbachfamilyfoundation.org)

URL: [www.zellerbachfamilyfoundation.org](http://www.zellerbachfamilyfoundation.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$125,232,175

Total giving: \$4,884,760

### EIN

946069482

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Incorporated in 1956 in CA.

Originally named the Zellerbach Family Fund, The Zellerbach Family Foundation was established in 1956 by Mrs. Jennie B. Zellerbach.

### Limitations

Giving primarily in the San Francisco Bay Area, CA.

No grants to individuals, or for capital or endowment funds, research, scholarships, or fellowships; no loans.

### Purpose and Activities

The foundation focuses its giving in the San Francisco Bay Area, CA and concentrates on the following program areas: Strengthening communities; Improving the management, practice and accountability of public systems with a focus on child welfare, mental health and education; Improving the quality of life for refugees and immigrants and supporting their participation in society; Youth development through the arts; Major community institutions; and Community Arts.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Community Arts

Grants in this category seek to ensure the availability of a wide variety of cultural experiences in the San Francisco Bay Area through community art. The focus is on improving the capacity to perform, developing new audiences, encouraging new artists and expanding multicultural experiences. For application information see foundation's Web site.

#### Grant Support

Grants in this category support cross-cutting activities that address the broad interests of the foundation. These grants provide support for publications, conferences, surveys, collaborations, organizations, or other efforts that enhance or inform the work of

the foundation or of its grantees. Grants in this category also support efforts of special importance to the foundation that may be unrelated to its major grantmaking categories.

### **Immigrants and Refugees**

Grants are focused on programs that improve the lives of immigrants and refugees and support their integration into society through citizenship, work, education, and community participation.

### **Improving Human Service Systems and Institutions**

Grants are intended to improve the management, practice and accountability of public systems and institutions serving families and children. The focus is on mental health, and child welfare.

### **Major Community Institutions and Arts Infrastructure**

Organizations under whose expertise and dedication traditional cultural forms flourish have, through their longevity and significance, attained the status of institutions. Grants in this program provide support to these institutions and sustain or improve the venues in which some of these endeavors take place.

### **Strengthening Communities**

Grants in this area aim to improve communities by strengthening essential community institutions, in particular public schools. Grants are intended to improve educational outcomes for children and to build strong public schools through support of parent leadership and engagement efforts.

### **Youth Development Through the Arts**

Grants are focused on efforts to help youth make a successful transition to adulthood through programs that provide caring adult relationships, life-enhancing experiences, and opportunities to explore and develop unique strengths. Grants are directed toward programs in low-income and distressed neighborhoods where youth have the greatest need and are focused on arts-based programs through which youth can explore, develop, learn through, and enrich their artistic experience.

## **Fields of Interest**

### **Subjects**

- Arts, single organization support
- Human services
- Minorities/immigrants, centers/services
- Performing arts
- Youth development

### **Population Groups**

- Economically disadvantaged
- Immigrants/refugees

### **Geographic Focus**

- California

### **Types of Support**

- Continuing support
- General/operating support
- Program development
- Program evaluation
- Technical assistance

### **Publications**

- Annual report

### **Application Information**

The foundation accepts proposals only for its Community Arts program. All other program grants are initiated by the foundation. See foundation's web site for Community Arts application information.

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. Descriptive literature about organization
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Copy of current year's organizational budget and/or project budget

Initial approach: Community Arts application with application on foundation web site

Board meeting date(s): Quarterly

Deadline(s): See foundation web site for current deadlines

Final notification: Quarterly

Additional information: Please see application website at [www.zellerbachfamilyfoundation.org](http://www.zellerbachfamilyfoundation.org) for detailed application requirements.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Jennie B. Zellerbach‡

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- William J. Zellerbach \*, Chair.  
Affiliation(s):  
*William & Margery Zellerbach Foundation, Pres. and Dir.  
San Francisco Symphony, Life Governor*
- Thomas H. Zellerbach \*, Pres.
- Nancy Zellerbach Boschwitz \*, V.P. and Secy.
- Charles R. Zellerbach \*, V.P. and Treas.
- Raymond H. Williams \*, V.P.
- Allison Magee, Exec. Dir.
- Jeanette M. Dunckel
- Philip S. Ehrlich, Jr.  
Affiliation(s):  
*San Francisco Symphony, Life Governor*
- Mary Ann Miliias
- Stephen R. Shapiro
- Suchi Somasekar
- Mildred Thompson

## Staff

### Number of Staff

5 full-time professional

1 part-time professional

1 full-time support

1 part-time support

### Key Staff

*Note: Does not include officers.*

- Lina Avidan, Prog. Exec.
- Heather Honegger, Dir., Finance
- Linda Howe, Prog. Exec.
- Amy Price, Prog. Exec.
- Michael Smith, Tech. and Facilities Mgr.
- Cindy Yoshiyama, Admin. Asst.

## Memberships

### Regional Associations of Grantmakers

- Northern California Grantmakers

### Affinity Groups

- Grantmakers Concerned with Immigrants and Refugees
- Grantmakers for Children, Youth and Families
- Grantmakers for Education
- Youth Transition Funders Group

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$125,232,175 (market value)

Expenditures: \$7,138,386  
Total giving: \$4,884,760  
Qualifying distributions: \$4,884,760  
Giving activities include:  
\$4,884,760 for 316 grants (high: \$140,000; low: \$1,000)  
Estimated financial data for year ending 2012-12-31:  
Assets: \$130,000,000  
Grants: \$5,000,000

## Online Communications

- [Knowledge Center](#)

## Additional Location Information

County: San Francisco  
Metropolitan area: San Francisco-Oakland-Fremont, CA  
Congressional district: California District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$100,000 to New America Media, San Francisco, CA, in 2012. For California Council on Youth Relations, speakers bureau of youth who have been involved in the mental health, foster care, and other public systems, to provide shared learning and support for Zellerbach Family Foundation grantees focused on youth leadership
- \$55,000 to La Cocina, San Francisco, CA, in 2012. For full-service, shared-use commercial kitchen, technical assistance, and business incubator project that assists low-income Latina women to develop and manage successful food-related businesses

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## Greater Worcester Community Foundation, Inc.

**Last Updated:** 2014-02-07

### At A Glance

370 Main St., Ste. 650  
Worcester, MA United States 01608-1738  
Telephone: (508) 755-0980  
Contact: Donor Services: Kelly A. Stimson, Dir., Donor Svcs.; For grants: Pam Kane, Sr. Prog. Off.  
Fax: (508) 755-3406  
E-mail: [donorservices@greaterworcester.org](mailto:donorservices@greaterworcester.org)  
URL: [www.greaterworcester.org](http://www.greaterworcester.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$124,690,268  
Total giving: \$5,320,132

### EIN

042572276

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Additional e-mail: [info@greaterworcester.org](mailto:info@greaterworcester.org); Grant inquiry e-mail: [pkane@greaterworcester.org](mailto:pkane@greaterworcester.org)

### Background

Incorporated in 1975 in MA.

Since 1975 the foundation has built a permanent, flexible endowment and has distributed grants and awards totaling more than \$45 million to a broad range of organizations and people throughout the region.

### Limitations

Giving limited to Worcester County, MA.

No grants to individuals (except for designated scholarship funds), or for capital campaigns or endowments.

## **Purpose and Activities**

The foundation's mission is to increase philanthropy and build healthy and vibrant communities throughout Central Massachusetts. The foundation achieves its mission in four primary ways: 1) works with donor on tailored giving programs; 2) invests in local nonprofit organizations through grants and technical support; 3) convenes people and organizations with shared goals to solve problems; and 4) safeguards the assets in its trust.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Arts and Culture**

The foundation supports arts and culture programs that enhance appreciation of diverse traditions, build strength and leadership of the creative sector, provide arts education, make neighborhoods more vibrant, or offer respite and inspiration to communities. Beginning March 15, 2010, all arts and culture applicants must complete a data profile through the Massachusetts Cultural Data Project (CDP) and submit a standardized report with all discretionary grant applications.

### **Community Development**

This area of interest includes supporting the creation of housing for low-income families, physical and safety improvements at the neighborhood level, and the engagement of residents.

### **Education**

This area of interest includes supporting early childhood, academic achievement for disadvantaged youth, lifelong learning for adults, English as a second language, and worker training.

### **Environment**

This area of interest includes supporting education in science and ecology, protection of the area's natural resources, public education and grassroots community efforts, land conservation, and expansion of opportunities for outdoor recreation.

### **Health**

This area of interest includes improvement and access to health care for vulnerable low-income children and communities susceptible to poor health, and to address unhealthy behaviors such as tobacco use, poor nutrition, lack of exercise, and binge drinking.

### **Human Services**

This area of interest includes supporting human services such as counseling and crisis support, legal services, shelter and housing, protection of children and vulnerable elders, refugees and immigrants, and integration of people with disabilities.

### **Scholarships**

The foundation offers many scholarships for local students to attend college. Awards are made through an annual, competitive selection process that takes place from Mar. through June. Each scholarship fund has special criteria established by donors. The qualifications of each applicant will be matched accordingly. The amount of money for each award varies, from \$250 to \$5,000, depending on the size of the fund and the criteria set by the donors. Many of the awards are renewable.

## **Fields of Interest**

### **Subjects**

- Aging, centers/services
- Arts
- Children/youth, services
- Community/economic development
- Crime/violence prevention, abuse prevention
- Education
- Environment
- Family services
- Government/public administration
- Health care
- Health organizations, association
- Homeless, human services
- Housing/shelter, development
- Human services
- Humanities
- Medical school/education
- Nursing school/education
- Public affairs
- Youth development

### **Population Groups**

- African Americans/Blacks
- Aging



- AIDS, people with
- Children
- Disabilities, people with
- Economically disadvantaged
- Homeless
- Youth

## Geographic Focus

- Massachusetts

## Types of Support

- Program development
- Program evaluation
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Newsletter

## Application Information

Visit foundation web site for link to online application forms and guidelines. Scholarships are for residents of Worcester County, MA, only.

Application form required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Results expected from proposed grant
3. Statement of problem project will address
4. Name, address and phone number of organization
5. Copy of IRS Determination Letter
6. Copy of most recent annual report/audited financial statement/990
7. How project's results will be evaluated or measured
8. Listing of board of directors, trustees, officers and other key people and their affiliations
9. Detailed description of project and amount of funding requested
10. Contact person
11. Copy of current year's organizational budget and/or project budget
12. Listing of additional sources and amount of support
13. Additional materials/documentation

Initial approach: Telephone and create online profile

Copies of proposal: 1

Board meeting date(s): Monthly

Deadline(s): Mar. 15 and Sept. 15 for discretionary grants; varies for others

Final notification: Mar. and Sept. for discretionary grants; varies for others

Additional information: Discretionary grant sizes range from \$3,000 to \$25,000.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Gerald "Lee" Gaudette, III \*, Chair.  
Affiliation(s):  
*Gaudette Insurance, Inc., Pres.*
- Warner S. Fletcher \*, Vice-Chair.  
Affiliation(s):  
*Fletcher and Tilton, PC, Dir.*
- Ann T. Lisi \*, C.E.O. and Pres.
- Carolyn Stempler \*, Clerk  
Affiliation(s):

*Carolyn and June Designs, Member*

- Thomas J. Bartholomew \*, Treas.
- Robert S. Adler  
Affiliation(s):  
*Seder and Chandler, Member*
- Brian M. Chandley  
Affiliation(s):  
*Southbridge Savings Bank, Member*
- J. Christopher Collins
- Tracy A. Craig
- Gerald M. Gates  
Affiliation(s):  
*American Stop Loss, Member*
- Timothy M. Jarry  
Affiliation(s):  
*College of the Holy Cross, Member*
- Alison C. Kenary
- Patsy A. Lewis
- Linda Carre Looft  
Affiliation(s):  
*WPI, Member*
- Monica E. Lowell  
Affiliation(s):  
*UMass Memorial Health Care, V.P.*
- Ann K. Molloy  
Affiliation(s):  
*Mountain, Dearborn and Whiting LLP, Member*
- Mary C. Ritter  
Affiliation(s):  
*Fallon Community Health Plan, V.P.*
- Scott Rossiter  
Affiliation(s):  
*Lampin Corporation, Chair.*
- George A. Tetler, III  
Affiliation(s):  
*Bowditch and Dewey, Member*
- Matthew Wally  
Affiliation(s):  
*TD Bank, Member*
- Charles A. "Chick" Weiss  
Affiliation(s):  
*College of the Holy Cross, Member*

## **Distribution Committee**

- Gerald Gates \*, Chair.
- Joanne Calista
- Linda C. Looft
- Nadia T. McGourthy
- Philip Niddrie
- Scott Williams

## **Staff**

### **Number of Staff**

7 full-time professional

2 full-time support

1 part-time support

### **Key Staff**

*Note: Does not include officers.*

- Diane Allain, Acct. Off.
- Pamela B. Kane, Sr. Prog. Off.
- Gail T. Randall, Special Projects Off.
- Joanne M. Reagan, Human Resources and Office Mgr.

- Beckley Schowalter, Donor Svcs. Off. and Scholarship Coord.
- Kelly A. Stimson, Dir., Donor Svcs. and Comms.
- Allyson Weber, Finance Asst.

## Memberships

### Regional Associations of Grantmakers

- Associated Grant Makers

### Affinity Groups

- Grantmakers for Effective Organizations

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$124,690,268 (market value)

Gifts received: \$3,507,930

Expenditures: \$7,684,053

Total giving: \$5,320,132

Qualifying distributions: \$7,229,179

Giving activities include:

\$4,734,567 for 350 grants

\$573,924 for 358 grants to individuals

\$7,229,179 for foundation-administered programs

## Online Communications

- [Grants Database](#)
- [E-Newsletter](#)

## Additional Location Information

County: Worcester

Metropolitan area: Worcester, MA

Congressional district: Massachusetts District 02

# Ventura County Community Foundation

**Last Updated:** 2014-01-14

## At A Glance

4001 Mission Oaks Blvd.

Camarillo, CA United States 93010-8364

Telephone: (805) 988-0196

Contact: Hugh J. Ralston, C.E.O.; For grants: LaToya Ford, Prog. Assoc. and Grants Mgr.

Fax: (805) 485-2700

E-mail: [vccf@vccf.org](mailto:vccf@vccf.org)

URL: [www.vccf.org](http://www.vccf.org)

## Type of Grantmaker

Community foundation

## Financial Data

(yr. ended 2012-09-30)

Assets: \$118,666,128

Total giving: \$4,671,079

## EIN

770165029

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Grant inquiry e-mail: [lford@vccf.org](mailto:lford@vccf.org)

## **Background**

Incorporated in 1987 in CA.

## **Limitations**

Giving primarily in Ventura County, CA.

No support for religious purposes.

No grants to individuals (except for scholarships), or for endowments, annual campaigns, budget deficits, or land acquisition; no program-related investments.

## **Purpose and Activities**

The foundation seeks to enrich and enhance the quality of life in Ventura County and to provide leadership to residents and nonprofit organizations in building an enduring source of funds and strengthening community participation to meet the changing needs and challenges of the community.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Barbara Barnard Smith Fund for World Musics**

Established to enhance understanding of global intercultural and local multicultural environments through expanding acquaintance with artistic heritages beyond those of Euro-American concert traditions. The donor-advised fund will consider applications from schools and from organizations established to present concerts for the public to support performances of non-Western classical and folk musics by bearers of these traditions, and of contemporary compositions for traditional or Western instruments inspired by and incorporating elements of these musics.

### **Bobbie Steindler Beatty Academic Opportunity Fund**

Supports youth between the ages of 12-18 who reside in Oxnard, Port Hueneme and Camarillo, to further their academic progress. The minimum grant amount is \$250 and the maximum is \$1,000. Grants may benefit one or more students. Funds may be used for a variety of expenses such as books, school supplies, clothes, eyeglasses, or for expenses that, if not funded, could stand in the way of an education for students who are from low-income families. Non-profit organizations and public entities (such as schools and/or school districts) are eligible to apply (one application per organization with exception of fiscal sponsors.) Individuals are not eligible to apply.

### **Community Response Fund**

Established to support needs in the community and has, over the years, not only sustained the Special & Urgent Needs (SUN) Fund, but a wide variety of issues and projects. The funding priority for the 2013-14 Annual Grants Program is afterschool programming, such as tutoring/homework help, academic enrichment and arts programs for K-8 students, with a preference for programs that serve low income students. A total of \$19,000 is available. Requests up to \$5,000 will be considered. Community based, 501(c)(3) designated non-profit organizations, public entities (such as schools and/or school districts) are eligible to apply (one application per organization)

### **Destino: The Hispanic Legacy Fund**

Established an endowed grantmaking fund to provide opportunities for the economic, educational, physical, emotional, social, artistic and personal growth of Latinos in Ventura County. Each grant cycle, founders and donors to the Fund review the needs of the community and vote to select issues of importance to Latinos in the County.

### **Douglas Roy III We Care Trust Fund**

Established to support medical treatment for Douglas Roy III, who suffered severe burn injuries at the age of six. In 1995, remaining assets of the Trust were used to establish the Douglas Roy III We Care Trust Fund foundation. The purpose of the fund is to support the provision of initial medical care, subsequent medical treatment and support services for severely burned persons, provide other aid to burn victims and their families, and to provide fire and burn education.

### **Dr. Maxine Crossley Endowment Fund**

The fund provides support for needed services for physically or mentally handicapped children in Ventura County. Schools and nonprofit organizations serving children and adolescents with special education needs are eligible to apply. Applications are accepted from 501(c)(3)-designated public charities, public schools and school districts.

### **Heritage Fund**

Established as an endowed grantmaking fund to provide opportunities for local nonprofits to have the resources and time to study and document the County's heritage, share who we are, and how our county has grown and prospered. The Heritage Fund celebrates Ventura County's unique history beginning in the early times and will continue throughout the years in the future. A total of \$56,000, with grants of up to \$10,000, is available for this year's funding priorities: 1) preserving and honoring the local history; 2) expanding knowledge of Ventura County history; and 3) translating our County's heritage to students and youth in Ventura County.

### **Scholarships**

The foundation has awarded more than \$7 million in scholarships to deserving Ventura County students and is the local leader in granting financial aid to promising scholars. The foundation's Scholarship Program opens doors of educational

opportunity for students of all ages. By educating individuals, the entire community is strengthened. The Community Foundation links donors with financial resources to students with potential for future achievement. A scholarship is more than a financial award, it is the key that unlocks the future for our youth by building their confidence.

### **Social Justice Fund for Ventura County**

The purpose of the fund is to strengthen social justice in Ventura County by providing financial grants and other support to grassroots efforts that address root causes of injustice and remove structural and institutional barriers to social, economic and environmental equity.

### **SUN Fund: Special and Urgent Needs Fund**

The foundation provides funds that respond quickly to urgent or emergency needs where a small investment will make a big difference. This is accomplished by providing grants up to \$5,000 to support immediate, one-time needs.

### **The Ventura County Fund for Farmworker Housing**

The fund supports efforts that will preserve, enhance and increase the supply of decent, safe, sanitary and affordable housing for agricultural workers in Ventura County. This program was launched with a generous grant from Washington Mutual and contributions from other donors.

### **The Women's Legacy Fund**

The foundation provides grants to nonprofit organizations providing opportunities for the economic, educational, physical, emotional, social, artistic and personal growth of women and girls in Ventura County.

### **Ventura County Veterans Fund**

The fund provides funding opportunities for organizations that offer services to veterans, particularly re-entering and returning combat veterans and their families throughout the county. Through funding a variety of programs, the foundation seeks to enhance the quality of life and assist the men and women that have served through all branches of the military.

## **Fields of Interest**

### **Subjects**

- Arts
- Civil/human rights
- Education
- Family services
- Health organizations, association
- Housing/shelter
- Human services
- Youth, services

### **Population Groups**

- Economically disadvantaged
- Girls
- Hispanics/Latinos
- Women

## **Geographic Focus**

- California

## **Types of Support**

- Conferences/seminars
- Emergency funds
- Equipment
- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## **Publications**

- Application guidelines
- Annual report (including application guidelines)
- Financial statement
- Informational brochure
- Newsletter

## Application Information

Number of requested proposal copies may vary from 1 to 12. Visit foundation web site for application forms and specific guidelines per grant type.

Application form required.

Applicants should submit the following:

1. Role played by volunteers
2. Timetable for implementation and evaluation of project
3. How project will be sustained once grantmaker support is completed
4. Results expected from proposed grant
5. Statement of problem project will address
6. Population served
7. Name, address and phone number of organization
8. Brief history of organization and description of its mission
9. Geographic area to be served
10. How project's results will be evaluated or measured
11. Listing of board of directors, trustees, officers and other key people and their affiliations
12. Detailed description of project and amount of funding requested
13. Plans for cooperation with other organizations, if any
14. Contact person
15. Copy of current year's organizational budget and/or project budget

Initial approach: Complete applications in response to RFP

Board meeting date(s): Bimonthly

Deadline(s): Varies (as designated by RFP)

Final notification: June for scholarships; for all other applications, as designated by RFP

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Gary E. Erickson \*, Chair.  
Affiliation(s):  
*The Erickson Group, C.E.O. and Pres.*
- Henry L. "Hank" Lacayo \*, Vice-Chair.  
Affiliation(s):  
*Congress of California Seniors, State Pres.  
United Way of Ventura County, Board Member  
California State University Channel Islands, Community Advisory Board and President's Circle Member  
El Concilio del Condado de Ventura, Board Member  
El Centrito de La Colonia, Board Member  
Labor Council for Latin American Advancement, National Pres. Emeritus and Founder  
U.S. Hispanic Leadership Institute, Co-Founder*
- Terri E. Lisagor \*, Vice-Chair.  
Affiliation(s):  
*California State University, Northridge, Professor of Nutrition/Food Science  
University California Los Angeles, Lecturer*
- Stacy A. Roscoe \*, Vice-Chair.  
Affiliation(s):  
*Ventura County Civic Alliance, Chair., Steering Comm.  
Ventura County Economic Development Association, Lifetime Board Member  
Southern California, Chair., Water Comm.  
Carnegie Museum Cornerstones, Casa Pacifica, Board Member*
- Mike Silacci \*, Vice-Chair. and Treas.  
Affiliation(s):  
*AT&  
T, External Affairs, Exec. Dir.*
- Hugh J. Ralston, C.E.O. and Pres.
- Clare M. Brown, V.P. and Cont.
- Linda Garcia, V.P., Prog. and Grants
- Dena C. Jenson, V.P. and Dir., Center for Nonprofit Leadership
- Roz McGrath, Secy.  
Affiliation(s):  
*McGrath Family Farm, Farm Mgr.*
- Tim Gallagher

Affiliation(s):  
*Gallagher 20/20, Pres.*

- Scott Hansen  
Affiliation(s):  
*Wells Fargo Private Bank, Regional Dir.*  
*Big Brothers Big Sisters of Ventura County, V.P.*  
*CSUCI, Planned Giving Advisory Council*
- Robert J. Katch  
Affiliation(s):  
*Pepperdine University, Associate Treas.*  
*Pepperdine University, Adjunct Professor*  
*Pepperdine University - Seaver College, Board Member*
- Stan Mantooth  
Affiliation(s):  
*Ventura County, Superintendent of Schools*  
*California State University Channel Islands, Adjunct Faculty Member*  
*Ventura County First 5, Commissioner*  
*United Way of Ventura County, Board Member*  
*Ventura County, Workforce Investment Board Member*  
*County Schools Federal Credit Union, Dir.*  
*Venutra County Discovery Center, Board Member*
- Charles Maxey, Ph.D.
- M. Carmen Ramirez  
Affiliation(s):  
*Self Help Legal Access Center, Coord., Ventura Superior Court*  
*Teatro de Las Americas, Board Member*  
*California State University Channel Islands, President's Community Advisory Comm. Member*  
*Studio Channel Islands Art Center, Pres.*
- Mary L. Schwabauer  
Affiliation(s):  
*Leavens Ranches, Co-Owner*  
*Ventura County Civic Alliance, Steering Comm. Member*
- Pierre Y. Tada  
Affiliation(s):  
*Granite Peak Partners Inc., Founding Principal*  
*California State UN Foundation, Tr.*  
*CA Agricultural Leadership Foundation, Tr.*
- Bonnie Weigel  
Affiliation(s):  
*FOOD Share, C.E.O.*  
*United Way Ventura County, Women's Leadership Council*  
*Topa Tower Club, Board of Governors Member*

## **Staff**

### **Number of Staff**

5 full-time professional

8 full-time support

5 part-time support

3 shared staff (shared with Martin V. and Martha K. Smith Foundation, Swift Memorial Health Care Foundation)

### **Key Staff**

*Note: Does not include officers.*

- Lauren Arzu, Mktg. and Outreach Coord.
- Colleen Cason, Dir., Comms. and Mktg.
- Hannah Davey, Comms. Assoc.
- LaToya Ford, Prog. Assoc. and Grants Mgr.
- Mayra Rincon, Events Coord.
- Claudia Sanchez, Finance Assoc.
- Susan Seale, Dir., Progs. and Center for Nonprofit Leadership
- Lindsay Smith, Dir., Donor Rels.
- Judie Talbott, Finance Acct.
- Virginia Weber, Prog. Off., Scholarships
- Stephanie Wilson, Capital Campaign Coord.
- Kay Wolverton Ito, Fund Development Off.

## Memberships

### Regional Associations of Grantmakers

- League of California Community Foundations
- Southern California Grantmakers

### Affinity Groups

- Funders' Network for Smart Growth and Livable Communities

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-09-30

Assets: \$118,666,128 (market value)

Gifts received: \$7,357,251

Expenditures: \$6,726,232

Total giving: \$4,671,079

Qualifying distributions: \$5,535,410

Giving activities include:

\$4,671,079 for grants

## Online Communications

- [Scholarships Facebook Page](#)
- [Grants List](#)
- [E-Newsletter](#)

## Additional Location Information

County: Ventura

Metropolitan area: Oxnard-Thousand Oaks-Ventura, CA

Congressional district: California District 26

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$100,000 to California State University Channel Islands Foundation, Camarillo, CA, in 2011. For Ventura Nursing Legacy Grants Fund
- \$50,922 to Ventura College Foundation, Ventura, CA, in 2011. For James V. and Idah W. Iff Scholarship Fund
- \$19,500 to Childrens Burn Foundation, Sherman Oaks, CA, in 2011. For Douglas Roy III We Care Trust Fund
- \$15,000 to Saint Jude the Apostle Catholic Church, Atlanta, GA, in 2011. For RED Family Fund
- \$10,000 to Ventura County Community AIDS Partnership, Camarillo, CA, in 2011. For Ruth Daily Livingston Fund
- \$9,190 to Ventura County Behavioral Health Department, Oxnard, CA, in 2011. For Greenblatt Family Fund
- \$8,463 to Casa Pacifica Centers for Children and Families, Camarillo, CA, in 2011. For James C. Basile Fund
- \$5,000 to Ventura County Housing Trust Fund, CA, in 2011. For VCCF Community Response Fund
- \$3,000 to Future Leaders of America, Oxnard, CA, in 2011. For Reiter Brothers Inc Foundation Fund
- \$500 to Rain Communities, Camarillo, CA, in 2011. For Bobbie Steindler Beatty Academic Opportunity Fund in honor of Howie and Ann Steindler

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## The Cameron Foundation

Last Updated: 2014-01-13

### At A Glance

228 S. Sycamore St.

Petersburg, VA United States 23803-4260

Telephone: (804) 732-8900

Contact: J. Todd Graham, Pres.; Jill C. Coleman, V.P., Progs.

E-mail: [tgraham@camfound.org](mailto:tgraham@camfound.org)

URL: [www.camfound.org](http://www.camfound.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public



- Health conversion foundation

## Financial Data

(yr. ended 2012-12-31)  
Assets: \$118,605,041  
Total giving: \$2,594,141

## EIN

200097152

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

## Additional Contact Information

Additional e-mail address: Michele Hornby, Grants Mgr.: [Mhornby@camfound.org](mailto:Mhornby@camfound.org)

## Background

Established in 2003 in VA; converted from the sale of Southside Regional Medical Center.

The Cameron Foundation is a private foundation that promotes and provides support for programs and activities that benefit the residents of the Tri-Cities and surrounding area. This is the region that historically had been served by the hospital now known as Southside Regional Medical Center.

## Limitations

Giving limited to VA, specifically to the cities of Petersburg, Colonial Heights and Hopewell; the counties of Dinwiddie, Prince George and Sussex; and the portion of the county of Chesterfield lying south of Route 10.

No support for religious or political purposes, or for-profit organizations.

No grants for endowments, medical research, academic or scientific research, the purchase of tickets to fundraising events or for advertising, solely for publishing, producing or distributing audio, visual or printed material, or attendance at conferences, seminars or meetings.

## Purpose and Activities

The foundation is dedicated to providing resources that will improve both the health and quality of life for people living in the communities it serves.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Grants

The foundation supports organizations and activities that empower people through the employment of creative responses to problems that address root causes, rather than symptoms, and which build upon community strength. The foundation pays particular attention to efforts that expand access to opportunities for people from low-income and otherwise disadvantaged communities and that demonstrate a commitment to diversity and inclusiveness in the targeting and delivery of services. Grants will be made in the fields of human services, civic affairs, community and economic development, education, conservation and historic preservation, and cultural enrichment. Eligible organizations must have 501(c)(3) status, serve a population of which at least a majority reside within the area served by the foundation, and be governed by a volunteer board of directors that consist of at least five unrelated persons. The following types of grants are available: project grants (intended to support a specific connected set of activities carried out by an organization), capital grants (facilitate the purchase of land, construction of physical facilities, and acquisition of equipment by an organization), technical assistance grants (intended to support organizational development and/or effectiveness through the provision of operational or management consultation services including, but not limited to, fundraising and marketing assistance, financial planning, program development, strategic planning, and board and/or staff development), and general operating grants (intended to fund the on-going operations of an organization, including the regular personnel, administrative, fundraising, and office expenses of existing agency programs)

## Fields of Interest

### Subjects

- Arts
- Community/economic development
- Economic development
- Education
- Health care
- Historic preservation/historical societies
- Human services

## Geographic Focus

- Virginia

## Types of Support

- Building/renovation
- Capital campaigns
- Consulting services
- Continuing support
- Curriculum development
- Equipment
- General/operating support
- Land acquisition
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Biennial report (including application guidelines)
- Financial statement
- Grants list
- Informational brochure (including application guidelines)
- Newsletter

## Application Information

The letter of intent must be accompanied by a pre-screening checklist that will be provided by the foundation. The letter of intent and the pre-screened checklist should be hand-delivered or mailed to the foundation; faxes are not accepted. One copy of the letter of intent and the pre-screening checklist must be submitted at least six weeks prior to the deadline for proposals for the next grant cycle. After the letter of intent has been reviewed by the foundation, the second step is submission of a full proposal if your organization is invited to do so by the foundation.

Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Qualifications of key personnel
4. Statement of problem project will address
5. Brief history of organization and description of its mission
6. Listing of board of directors, trustees, officers and other key people and their affiliations

Initial approach: Letter of intent (no more than 3 double-spaced pages in 12 point or larger font)

Copies of proposal: 2

Board meeting date(s): Feb., June, and Oct. for grants; Apr., Aug., and Dec. for policy

Deadline(s): Jan. 2, May 1, and Sept. 1

Final notification: The foundation will provide a response to the letter of intent no later than four weeks prior to the deadline for submitting proposals.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Larry C. Tucker \*, Chair.  
Affiliation(s):  
*First Federal Savings Bank, Dir., Business Devel.*  
*Richard Bland College Foundation Fund, V.P.*  
*Southside Virginia Emergency Crew board of Trustees, Pres.*  
*Union Finance Corporation, Dir. and Member, Executive Committee*  
*Appomattox Education Foundation Board, Member*  
*Petersburg (Luncheon) Rotarty Club, Member*
- Pam Martin Comstock \*, Vice-Chair.
- J. Todd Graham \*, Pres.
- Jill C. Coleman, V.P., Progs.
- Kevin A. Hill \*, Secy.  
Affiliation(s):

*Richmond Redevelopment and Housing Authority, Budget Mgr.*

- Donald L. Haraway \*, Treas.
- J. Tolleison Morriss, VI
- Anne C. Taylor \*  
Affiliation(s):  
*Southside Regional Medical Center, Member, Board*  
*United Way, Member, Board*  
*Boys and Girls Club, Member, Board*  
*Mary Carter Beacon House, Member, Board*  
*Ivy Community Foundation, Member, Board*
- James L. Thacker, Jr.
- Cleveland A. Wright

## Staff

### Number of Staff

6 full-time professional

3 full-time support

1 part-time support

### Key Staff

*Note: Does not include officers.*

- Brandy Cramer, Prog. Off.
- Michelle Hornby, Grants Mgr.
- Cindy Humphrey, Exec. Asst./Office Mgr.
- Valerie Liggins, Prog. Off.
- Risha Stebbins, Sr. Prog. Off./Coord., Comms.

## Memberships

### Regional Associations of Grantmakers

- Southeastern Council of Foundations

### Affinity Groups

- Grantmakers for Effective Organizations

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Virginia Network of Nonprofit Organizations

## Financial Data

Year ended 2012-12-31

Assets: \$118,605,041 (market value)

Gifts received: \$362,292

Expenditures: \$5,222,415

Total giving: \$2,594,141

Qualifying distributions: \$6,072,990

Giving activities include:

\$2,531,697 for 74 grants (high: \$364,924; low: \$1,250)

\$62,444 for 50 employee matching gifts

## Additional Location Information

County: Petersburg City

Metropolitan area: Richmond, VA

Congressional district: Virginia District 03

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## Stoneman Family Foundation

**Last Updated:** 2014-01-16

### At A Glance

(formerly Anne and David Stoneman Charitable Foundation, Inc.)

400 Atlantic Ave.

Boston, MA United States 02110-3333

Telephone: (617) 482-1776

Contact: Julia M. Toulmin

## Type of Grantmaker

Independent foundation

## Additional Descriptor

- Family foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$114,877,596

Total giving: \$5,888,300

## EIN

046047379

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Background

Incorporated in 1957 in MA.

## Limitations

Giving primarily in Washington, DC, MA, and New York, NY.

No grants to individuals.

## Purpose and Activities

Giving to help low-income people achieve independence and economic self-sufficiency, and to improve the well-being of society by promoting economic justice.

## Fields of Interest

### Subjects

- Education
- Human services
- Social sciences, public policy

## Geographic Focus

- District of Columbia
- Massachusetts
- New York

## Types of Support

- General/operating support
- Mission-related investments/loans
- Program development

## Application Information

Contributes only to pre-selected organizations.

Application form not required.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Sidney Stoneman‡
- Miriam Stoneman‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Elizabeth Deknatel \*, Co-Chair.
- Eric Stein, Co-Chair.
- Jane Stein, Treas.
- Gabriel Deknatel
- Maria Deknatel
- Alan Rottenberg

- Gerda Stein
- David Wood

## Memberships

### Affinity Groups

- Funders' Committee for Civic Participation
- Mission Investors Exchange

## Financial Data

Year ended 2012-12-31

Assets: \$114,877,596 (market value)

Expenditures: \$7,822,799

Total giving: \$5,888,300

Qualifying distributions: \$6,433,771

Giving activities include:

\$5,888,300 for 75 grants (high: \$400,000; low: \$2,500)

## Additional Location Information

County: Suffolk

Metropolitan area: Boston-Cambridge-Quincy, MA-NH

Congressional district: Massachusetts District 08

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$500,000 to USAction Education Fund, Washington, DC, in 2010.
- \$500,000 to Center on Budget and Policy Priorities, Washington, DC, in 2010.
- \$350,000 to State Voices, Detroit, MI, in 2010.
- \$150,000 to Urban Institute, Washington, DC, in 2010.
- \$150,000 to Media Matters for America, Washington, DC, in 2010.
- \$125,000 to Media Matters for America, Washington, DC, in 2010.
- \$125,000 to Connecticut Voices for Children, New Haven, CT, in 2010.
- \$100,000 to Arkansas Advocates for Children and Families, Little Rock, AR, in 2010.
- \$100,000 to Blueprint North Carolina, Raleigh, NC, in 2010.
- \$75,000 to Georgia Budget and Policy Institute, Atlanta, GA, in 2010.

## Harry C. Trexler Trust

**Last Updated:** 2014-03-24

### At A Glance

33 S. 7th St., Ste. 205

Allentown, PA United States 18101-2406

Contact: Janet E. Roth, Exec. Dir.

Fax: (610) 437-5721

URL: [www.TrexlerTrust.org](http://www.TrexlerTrust.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2013-03-31)

Assets: \$114,463,040

Total giving: \$3,741,975

### EIN

231162215

### 990

[2013](#) [2012](#) [2011](#) [2011](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Background

Trust established in 1934 in PA.

After the death of Mr. Trexler's wife, Mary M. Trexler, in 1934, the two estates merged and the foundation became operative. General Trexler, one of the organizers of the Lehigh Portland Cement Co., was the chairman of the board until his death on Nov. 17, 1933. He also served on the boards of the Bell Telephone Co. of Pennsylvania, the Lehigh Valley Railroad, and the Pennsylvania Power and Light Co. Active in civic affairs, he was the father of Allentown's park system and first president of the Allentown Planning Commission.

## **Limitations**

Giving limited to Lehigh County, PA.

No grants to individuals, or for endowment funds, research, scholarships, or fellowships; no loans.

## **Purpose and Activities**

The trust provides that one-fourth of the income shall be added to the corpus, one-fourth paid to the city of Allentown for park purposes, and the remainder distributed to such charitable organizations and objects as shall be of the most benefit to humanity, but limited to Allentown and Lehigh County, Pennsylvania, particularly for hospitals, churches, institutions for the care of the crippled and orphans, youth agencies, social services, cultural programs, and support of ministerial students at two named Pennsylvania institutions.

## **Fields of Interest**

### **Subjects**

- Aging, centers/services
- Arts
- Children/youth, services
- Education
- Food banks
- Higher education
- Human services
- Recreation

### **Population Groups**

- Disabilities, people with
- Economically disadvantaged

## **Geographic Focus**

- Pennsylvania

## **Types of Support**

- Building/renovation
- Capital campaigns
- Continuing support
- Equipment
- General/operating support
- Land acquisition
- Matching/challenge support
- Program development

## **Publications**

- Application guidelines
- Annual report
- Grants list
- Occasional report

## **Application Information**

Prospective grantees are welcome to request a meeting with staff well in advance of the Dec. 1 deadline to discuss the grant application process. Questions may be directed to Janet E. Roth, Exec. Dir., at the trust office. Application form and guidelines available on foundation web site.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Population served
3. Copy of IRS Determination Letter
4. Copy of most recent annual report/audited financial statement/990
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Organization's charter and by-laws

8. Copy of current year's organizational budget and/or project budget
9. Listing of additional sources and amount of support

Initial approach: Letter no more than 3 pages

Copies of proposal: 1

Board meeting date(s): Monthly; grant distribution takes place annually after Mar. 31

Deadline(s): Dec. 1 for consideration at annual fund distribution

Final notification: June 1

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Harry C. Trexler‡
- Mary M. Trexler‡

## Officer

- Janet E. Roth, Exec. Dir.

## Trustees

- Barnet H. Fraenkel
- Fr. Daniel G. Gambet
- Malcolm J. Gross
- L. Charles Marcon
- Jamie P. Musselman

## Staff

### Number of Staff

1 full-time professional

1 part-time professional

1 full-time support

### Key Staff

*Note: Does not include officers.*

- Thomas H. Christman, Fin. Dir.

## Financial Data

Year ended 2013-03-31

Assets: \$114,463,040 (market value)

Expenditures: \$5,261,597

Total giving: \$3,741,975

Qualifying distributions: \$4,120,080

Giving activities include:

\$3,741,975 for 104 grants (high: \$1,039,598; low: \$1,000)

## Additional Location Information

County: Lehigh

Metropolitan area: Allentown-Bethlehem-Easton, PA-NJ

Congressional district: Pennsylvania District 15

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$1,601,875 to Allentown, City of, Allentown, PA, in 2011. To improve, extend and maintain parks
  - \$425,000 to Lehigh, County of, Allentown, PA, in 2011. For improvements to Trexler Nature Center
  - \$315,000 to Allentown Art Museum, Allentown, PA, in 2011. Toward capital campaign pledge
  - \$250,000 to Wildlands Conservancy, Emmaus, PA, in 2011. For Jordan Creek Greenway project
  - \$200,000 to Boy Scouts of America, Lehigh Valley, PA, in 2011. Toward camp improvements
  - \$200,000 to Casa Guadalupe Center, Allentown, PA, in 2011. Toward campaign for new building
  - \$100,000 to Sacred Heart Hospital, Allentown, PA, in 2011. For parish nurse program in Allentown
  - \$100,000 to Allentown Symphony Association, Allentown, PA, in 2011. For operating support
  - \$75,000 to Allentown Public Library, Allentown, PA, in 2011. For operating support
  - \$50,000 to Family Answers, Allentown, PA, in 2011. For building improvements
-

# The Jacob and Hilda Blaustein Foundation, Inc.

Last Updated: 2014-03-14

## At A Glance

1 South St., Ste. 2900  
Baltimore, MD United States 21202-3334  
Telephone: (410) 347-7201  
Contact: Betsy F. Ringel, Exec. Dir.  
Fax: (410) 347-7210  
E-mail: [info@blaufund.org](mailto:info@blaufund.org)  
URL: [www.blaufund.org/foundations/jacobandhilda\\_f...](http://www.blaufund.org/foundations/jacobandhilda_f...)

## Type of Grantmaker

Independent foundation

## Additional Descriptor

- Celebrity: Business
- Family foundation

## Financial Data

(yr. ended 2012-12-31)  
Assets: \$113,603,431  
Total giving: \$7,200,085

## EIN

526038382

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Background

Incorporated in 1957 in MD.

Founded by the late Jacob Blaustein and his wife, Hilda. In 1910, Jacob and his father, Louis Blaustein founded American Oil. The company gained national recognition for innovations such as one of the first drive-in gas stations, the first gasoline pump to show the motorist the amount of fuel received and the original antiknock gasoline that permitted the development of the high-compression engine. In 1954, American Oil merged with Standard Oil of Indiana, and American Trading and Production Corporation and the Blaustein family became major stockholders. Standard Oil of Indiana changed its name to AMOCO Corporation in 1985 and, in 1998 merged with British Petroleum to form BP Amoco. Hilda Blaustein was a trustee of the Associated: Jewish Community Federation of Baltimore, the United Nations Association of Maryland, and the Women's Advertising Club of Baltimore.

## Limitations

Giving primarily in MD (no local projects outside Baltimore, MD); giving also in Israel.

No support for unaffiliated schools or synagogues.

No grants to individuals, or for fundraising events, or direct mail solicitations; no loans (except for program-related investments)

## Purpose and Activities

The foundation promotes social justice and human rights through its five program areas: Jewish life, strengthening Israeli democracy, health and mental health, educational opportunity, and human rights. The foundation supports organizations that promote systematic change; involve constituents in planning and decision making; encourage volunteer and professional development; and engage in ongoing program evaluation.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Educational Opportunity

The goal of this program is to ensure that low-income children and families have access to quality education and cultural opportunities. There is a geographic focus on Baltimore. The foundation seeks to: 1) strengthen public education, with an emphasis on secondary education; 2) support local advocacy and policy initiatives that advance quality education for all; and 3) nurture high-quality community arts programs that engage diverse audiences. The foundation supports system-wide public school reform, human capital development, leadership development, community organizing, and innovative service provision.

### Health and Mental Health

The goal of this program is to promote quality health and mental health care for underserved individuals. The foundation



supports innovative service provision in community-based settings; programs using evidence-based practices; and professional development. There is a geographic focus on Baltimore. The foundation seeks to: 1) address the health and mental health needs of low-income children and seniors through sustainable programs designed to meet service gaps; 2) support local and national advocacy and public policy initiatives to ensure access to quality care for low-income families; and 3) address environmental health issues.

### **Human Rights**

The goal of this program is to advance fundamental human rights. The foundation seeks to: 1) advance women's rights; 2) promote the right to education, particularly for adolescents and adults; and 3) support leadership development, capacity-building and training across a range of issue areas. The foundation's human rights work is primarily international, with a special interest in efforts that link domestic and international issues.

### **Jewish Life**

The goal of this program is to keep Judaism meaningful, compelling and responsive to contemporary concerns. The foundation seeks to: 1) engage the Jewish community in social justice efforts; 2) further progressive and inclusive approaches to Judaism; and 3) promote positive relations between Jews and members of other ethnic groups.

### **Strengthening Israeli Democracy**

The goal of this program is to strengthen Israel as a democratic, equitable, and pluralistic society. The foundation seeks to: 1) address fundamental social, economic, and ethnic inequalities; 2) empower Israel's most vulnerable and disadvantaged populations; and 3) promote liberal and pluralistic approaches to Judaism.

## **Fields of Interest**

### **Subjects**

- Arts
- Arts education
- Education, public education
- Education, reform
- Health care
- International human rights
- Jewish agencies & synagogues
- Jewish federated giving programs
- Mental health, treatment

### **International Interests**

- Israel

### **Geographic Focus**

- National, International

### **Types of Support**

- Building/renovation
- Capital campaigns
- Employee matching gifts
- Endowments
- General/operating support
- Matching/challenge support
- Program development
- Program evaluation
- Program-related investments/loans
- Technical assistance

### **Publications**

- Application guidelines
- Grants list

## **Application Information**

The foundation accepts applications that conform to the Association of Baltimore Area Grantmakers Common Grant Application.

Application form not required.

Applicants should submit the following:

1. Qualifications of key personnel
2. Copy of IRS Determination Letter
3. Brief history of organization and description of its mission
4. How project's results will be evaluated or measured

5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Copy of current year's organizational budget and/or project budget

Initial approach: Letter

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: 4 to 6 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Jacob Blaustein‡
- American Trading and Production Corp.
- Barbara B. Hirschhorn
- Elizabeth B. Roswell

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Michael J. Hirschhorn \*, Pres.  
Affiliation(s):  
*The David and Barbara B. Hirschhorn Foundation, Inc., V.P. and Tr.*
- Barbara B. Hirschhorn, V.P.  
Affiliation(s):  
*The David and Barbara B. Hirschhorn Foundation, Inc., Chair. and Tr.*
- Arthur E. Roswell \*, V.P.  
Affiliation(s):  
*Elizabeth B. and Arthur E. Roswell Foundation, Inc., Pres. and Tr.*
- Elizabeth B. Roswell \*, V.P.  
Affiliation(s):  
*Elizabeth B. and Arthur E. Roswell Foundation, Inc., Chair. and Tr.*
- Jill R. Robinson, Secy.
- Anne Patterson, Treas.
- Betsy F. Ringel, Exec. Dir.  
Affiliation(s):  
*The Henry and Ruth Blaustein Rosenberg Foundation, Inc., Exec. Dir.*  
*Morton K. and Jane Blaustein Foundation, Exec. Dir.*  
*David and Barbara B. Hirschhorn Foundation, Exec. Dir.*

## Staff

### Number of Staff

1 part-time professional

4 shared staff (shared with The Morton K. and Jane Blaustein Foundation, Inc., The David and Barbara B. Hirschhorn Foundation, Inc., The Henry and Ruth Blaustein Rosenberg Foundation, Inc., The Elizabeth B. and Arthur E. Roswell Foundation Inc.)

### Key Staff

*Note: Does not include officers.*

- Lara Hall, Sr. Prog. Off., Educational Opportunity, Health, and Mental Health
- Peggy Hug, Grants Admin.
- Brenda Bodenheimer Zlatin, Sr. Prog. Off., Jewish Life, Israel, and Human Rights

## Memberships

### Regional Associations of Grantmakers

- Association of Baltimore Area Grantmakers

### Affinity Groups

- Funders Network on Population, Reproductive Health and Rights
- Grantmakers for Education
- Grantmakers for Effective Organizations
- Grantmakers In Health
- Inter-Agency Task Force on Israeli Arab Issues
- International Human Rights Funders Group

## Associations and Other Philanthropic Organizations

- Maryland Association of Nonprofit Organizations

## Financial Data

Year ended 2012-12-31

Assets: \$113,603,431 (market value)

Gifts received: \$1,595,466

Expenditures: \$8,123,300

Total giving: \$7,200,085

Qualifying distributions: \$7,822,759

Giving activities include:

\$7,200,085 for 186 grants (high: \$1,200,000; low: \$100)

## Additional Location Information

County: Baltimore City

Metropolitan area: Baltimore-Towson, MD

Congressional district: Maryland District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$2,325,000 to Bizchut, The Israel Human Rights Center for People with Disabilities, Jerusalem, Israel, in 2012. For supplemental support for a new data management system
- \$1,200,000 to Associated: Jewish Community Federation of Baltimore, Baltimore, MD, in 2012. For general support for the annual campaign
- \$200,000 to Fund for Global Human Rights, Washington, DC, in 2012. For renewed general support to make grants to local and regional human rights groups around the world
- \$150,000 to Negev Institute for Strategies of Peace and Development, Beersheba, Israel, in 2012. For general support for activities to promote development in the Bedouin community and positive intergroup relations in the Negev
- \$100,000 to Bend the Arc: A Jewish Partnership for Justice, New York, NY, in 2012. For renewed general support
- \$100,000 to Kav Mashve, Tel Aviv, Israel, in 2012. For renewed support for the Career Training Program for Bedouin high school students in the Negev
- \$100,000 to Young Audiences of Maryland, Baltimore, MD, in 2012. For renewed general support of its programming in Baltimore City and support for the Access for All program
- \$75,000 to University of Maryland-Baltimore Foundation, Baltimore, MD, in 2012. For renewed support for Maryland Hospitals for a Healthy Environment
- \$70,000 to Agenda-The Israeli Center for Strategic Communication, Tel Aviv, Israel, in 2012. For renewed general support and for Shutafut-Sharaka, a coalition of coexistence groups working on media portrayal of Arab society
- \$70,000 to Witness, Inc., Brooklyn, NY, in 2012. For general support
- \$50,000 to American Jewish Joint Distribution Committee, New York, NY, in 2012. For renewed support for the Inter-Agency Task Force on Israeli Arab Issues
- \$50,000 to Union for Reform Judaism, New York, NY, in 2012. For renewed support for the Just Congregations Initiative to train Reform Jewish synagogues to address the root causes of economic and social injustice
- \$30,000 to American Visionary Art Museum, Baltimore, MD, in 2012. For renewed general support
- \$6,500 to Association of Baltimore Area Grantmakers, Baltimore, MD, in 2012. For general support through membership (JB, ER, HH Foundations and Atapco)

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## HFSF Grants Management, Inc.

Last Updated: 2013-04-13

### At A Glance

1 Biscayne Twr. , 2 S. Biscayne Blvd., Ste. 1710

Miami, FL United States 33131-1806

Telephone: (305) 374-7200

Contact: Peter Wood, V.P., Progs.

Fax: (305) 374-7003

E-mail: [pwood@hfsf.org](mailto:pwood@hfsf.org)

URL: [www.hfsf.org](http://www.hfsf.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Supporting organization

## Financial Data

(yr. ended 2011-12-31)

Assets: \$111,909,229

Total giving: \$5,441,442

## EIN

650005383

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 2002 in FL; supporting organization of the Health Foundation of South Florida.

## Limitations

Giving limited to Broward, Miami-Dade, and Monroe counties, FL.

## Purpose and Activities

The organization exists for charitable, scientific, and educational purposes to advance the health and well-being of the people of Broward, Miami-Dade, and Monroe counties; its grantmaking approach works to facilitate and support efforts at the neighborhood, county, and regional levels to improve the health status of underserved and uninsured individuals and families.

## Fields of Interest

### Subjects

- Dental care
- Health care
- Medicine/medical care, public education
- Public health
- Public health, obesity

## Geographic Focus

- Florida

## Types of Support

- Consulting services
- Curriculum development
- Equipment
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Scholarship funds
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Grants list
- Informational brochure (including application guidelines)

## Application Information

Application form required.

Initial approach: Submit preliminary proposal

Copies of proposal: 5

Board meeting date(s): Quarterly

Deadline(s): Spring and fall

Final notification: Three months

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Richard Lavina \*, Chair.  
Affiliation(s):  
*Kelley Swofford Roy, Inc., Pres.*  
*Miami Lighthouse for the Blind, Member*  
*Adopt-A-Pet, Member*  
*International Women's Forum, Member*  
*Miami Symphony Orchestra, Member*  
*World Trade Center Miami, Member*
- Loreen M. Chant \*, Vice-Chair.  
Affiliation(s):  
*City National Bank of Florida, Exec. V.P.*  
*YWCA of Greater Miami, Member*  
*Greater Miami Chamber of Commerce, Tr.*  
*National Association of Bank Women, Member*  
*Florida International University, Member, Council of 100*
- Steven E. Marcus, Ed.D. \*, Pres. and C.E.O.
- Peter Wood \*, V.P., Progs.
- Kathy Antieau \*, C.F.O.
- Roymi Membiela \*, Secy.  
Affiliation(s):  
*Florida International University, Dean, School of Nursing*  
*Kendall Regional Medical Center, Chair., Board*  
*American Academy of Nursing, Fellow and Board Member*  
*American Journal of Nursing, Editorial Board Member*  
*Florida Nurses Association, Chair., Task Force on Cultural Diversity*
- Richard B. Adams
- Sheldon D. Dagen  
Affiliation(s):  
*Sheldon D. Dagen, P.A., Pres.*
- James M. Eckhart  
Affiliation(s):  
*Peter Miller and Associates, P.A., Partner*  
*Westminster Christian School Foundation, Board Member*  
*Greater Miami Fellowship of Christian Athletes, Dir.*
- Arthur A. Finkle, C.L.U., Ch.F.C.  
Affiliation(s):  
*Arthur A. Finkle & Associates, Owner*  
*Million Dollar Round Table, Member*  
*American Society of Financial Services, Member*  
*National Association of Securities Dealers, Member*
- Philip Grossman, M.D., F.A.C.P.  
Affiliation(s):  
*Cedars Medical Center, Chief, Gastroenterology*  
*Erlan Medical Management, Inc., Pres.*  
*Crohn's Colitis Foundation, Member*  
*Kendall Endoscopy and Surgery Center, Chair.*  
*University of Miami School of Medicine, Clinical Assoc. Prof., Medicine*  
*American Gastroenterology Association, Member*  
*American College of Gastroenterology, Member*
- Susan Kelley
- Roderick K. King
- Ivette Motola
- Claire Michele Rice
- Thao M.P. Tran
- Stanley Worton, M.D.  
Affiliation(s):  
*American College of Radiology, Fellow*  
*Miami Beach Cultural Arts Trust, Member*

## **Memberships**

### **Affinity Groups**

- Grantmakers in Aging

## **Financial Data**

Year ended 2011-12-31

Assets: \$111,909,229 (market value)

Gifts received: \$436,007

Expenditures: \$8,352,013

Total giving: \$5,441,442

Qualifying distributions: N/A

Giving activities include:

\$5,441,442 for 121 grants (high: \$284,000; low: \$1,500)

### **Additional Location Information**

County: Miami-Dade

Metropolitan area: Miami-Fort Lauderdale-Pompano Beach, FL

Congressional district: Florida District 24

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## **Healthcare Georgia Foundation, Inc.**

**Last Updated:** 2014-08-14

### **At A Glance**

191 Peachtree St. N.E., Ste. 2650

Atlanta, GA United States 30303

Telephone: (404) 653-0990

Contact: Javier Sanchez, Grants Mgr.

Fax: (404) 577-8386

E-mail: [info@healthcaregeorgia.org](mailto:info@healthcaregeorgia.org)

URL: [www.healthcaregeorgia.org](http://www.healthcaregeorgia.org)

### **Type of Grantmaker**

Independent foundation

### **Additional Descriptor**

- Health conversion foundation

### **Financial Data**

(yr. ended 2012-12-31)

Assets: \$111,633,150

Total giving: \$3,958,525

### **EIN**

582418091

### **990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### **Background**

Established in 1999 in GA; converted from the merger of Blue Cross Blue Shield of Georgia with Wellpoint Health Networks.

### **Limitations**

Giving limited to GA.

No support for sectarian programs (benefiting only one religious organization)

No grants to individuals (except for award program), or for capital campaigns, or major equipment.

### **Purpose and Activities**

The foundation's mission is to advance the health of all Georgians and to expand access to affordable, quality health care for underserved individuals and communities. Specific goals include protecting and promoting the health of individuals, families and communities; improving the availability, quality, appropriateness and financing of health care services; and integrating and coordinating efforts to improve health and health care services. The foundation has also established the following grantmaking priorities: 1) addressing health disparities; 2) strengthening nonprofit health organizations; and 3) expanding access to primary health care.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Advancing Public Health in Georgia**

This is a social marketing and advocacy campaign created by the foundation to develop state and local leadership capacity to advocate for effective public health policy. The Hayslett Group was selected to design, execute and evaluate the campaign. In partnership with the foundation, Hayslett will: build local advocacy capacity for public health programs and policy; promote policies that strengthen state and local public health; facilitate collaboration across professions, associations, and leadership at state and local levels; and promote community awareness of the need for and benefits from an investment in public health.

### **Childhood Physical Activity and Nutrition Grant Program**

The purpose of the grant program is to address childhood overweight and physical inactivity by supporting school and community-based programs that increase physical activity and improve nutrition among Georgia's school-aged children (grades K-12) and youth. The Childhood Physical Activity and Nutrition Grant Program will provide grant support to schools and community-based organizations in Georgia for in-school, before school, and after school programs, serving children in communities outside of metropolitan Atlanta (i.e. Clayton, Cobb, DeKalb, Douglas, Fulton, Gwinnett, Newton, and Rockdale counties are excluded). See foundation's web site for more information.

### **Georgia Childhood Asthma Management Program**

The purpose of this program is to improve asthma management among children and adolescent populations by establishing and supporting coordinated, comprehensive evidence-based programs that foster linkages among those responsible for asthma care in children such as medical providers, schools, community organizations, and families. The program provides grant support to five organizations serving children in school, community, primary care or hospital-based settings. Georgia Southern University will provide cross-site and site-specific evaluation.

### **Joseph D. Greene Community Service Award**

Five individuals will be selected for the award. Individual nominees must be a volunteer or a previous volunteer for a health-related nonprofit, have made a passionate commitment to improving the quality of health in a Georgia community, be unselfish in contributing their time to community activities, and serve as a role model and inspiration to others. The foundation will also make a donation of \$1,000 in the name of the recipient to a Georgia-based nonprofit health organization of the recipient's choice.

## **Fields of Interest**

### **Subjects**

- Health care
- Public health

## **Geographic Focus**

- Georgia

## **Types of Support**

- Conferences/seminars
- General/operating support
- Income development
- Management development/capacity building
- Program development
- Program evaluation
- Publication
- Research
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Grants list
- Informational brochure (including application guidelines)
- Occasional report
- Program policy statement

## **Application Information**

The foundation is currently reviewing its Grantmaking Priorities and Guidelines. Please visit its web site for more information. The foundation engages in both proactive (solicited) and responsive (unsolicited) grantmaking. Proactive grantmaking will be carried out through an RFP process that addresses specific areas within the foundation's funding priorities. Responsive grantmaking will allow the foundation to support unsolicited proposals that fit its mission and fall within its funding priorities. See foundation web site for full application requirements and guidelines.

Application form required.

Applicants should submit the following:

1. Results expected from proposed grant
2. Statement of problem project will address

3. Population served
4. Name, address and phone number of organization
5. Brief history of organization and description of its mission
6. Detailed description of project and amount of funding requested

Initial approach: Potential applicants should view pre-application webinar on foundation web site. All applications should be submitted online via web site

Copies of proposal: 2

Board meeting date(s): Quarterly

Deadline(s): See foundation web site for current deadline

Final notification: Within 3 months for letters of inquiry; within 8 to 9 months for proposals; declinations are announced quarterly

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Blue Cross and Blue Shield of Georgia, Inc.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Diane Zabak Weems, M.D. \*, Chair.
- Francis Tedesco, M.D. \*, Vice-Chair.
- Gary D. Nelson, Ph.D., Pres.  
Affiliation(s):  
*Philanthropic Collaborative for a Healthy Georgia, Member*  
*Georgia State University College of Health and Human Services, Member, Board of Visitors*
- Lynn Thogerson \*, Secy.
- Teri Hartman \*, Treas.
- Michael J. Sweeney, III, C.F.O. and Dir., Finance
- Cheryl Christian
- Gene Godfrey
- Anne Griffith Hennessy
- Scott Kroell
- Pierluigi Mancini, Ph.D.
- Steven P. Merz
- Robert Nesbitt, M.D.
- Charles T. Stafford, M.D.

## Staff

### Number of Staff

8 full-time professional

1 full-time support

### Key Staff

*Note: Does not include officers.*

- Janette Blackbur, Dir. of Opers.
- Maddy Frey, Evaluation Mgr.
- Amy Hall, Distance Learning Coord.
- Andrea Young Kellum, Prog. Off.
- Javier Sanchez, Grants Mgr.
- Lisa Medellin, Prog. Off.
- Katie Watson, Admin. Asst.

## Memberships

### Regional Associations of Grantmakers

- Southeastern Council of Foundations

### Affinity Groups

- Georgia Public Health Association
- Georgia Rural Health Association
- Grantmakers In Health
- Technology Affinity Group

## Associations and Other Philanthropic Organizations



- Council on Foundations
- Georgia Center for Nonprofits

## Financial Data

Year ended 2012-12-31

Assets: \$111,633,150 (market value)

Expenditures: \$7,029,474

Total giving: \$3,958,525

Qualifying distributions: \$5,476,391

Giving activities include:

\$3,893,525 for 75 grants (high: \$128,000; low: \$2,050)

\$65,000 for 21 employee matching gifts

## Online Communications

- [Grant Applicants Survey](#)
- [E-Newsletter](#)
- [Grants Database](#)
- [Podcasts](#)

## Additional Location Information

County: Fulton

Metropolitan area: Atlanta-Sandy Springs-Marietta, GA

Congressional district: Georgia District 05

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$500,000 to Emory University, Atlanta, GA, in 2012. To implement school-based health center demonstration project in three elementary schools in Georgia
- \$130,000 to TechBridge, Atlanta, GA, in 2012. For technology implementation, network management, network maintenance, program support and training efforts for use of HealthTecDL for Healthcare Georgia Foundation's Distance Learning program
- \$60,000 to Georgia Southern University Research and Service Foundation, Statesboro, GA, in 2012. For work of Jiann-Ping Hsu College of Public Health to complete cross-site and site-specific evaluation of Georgia Childhood Asthma Management Program and to publish and disseminate evaluation results
- \$48,000 to Georgia Coalition Against Domestic Violence, Decatur, GA, in 2012. To provide training to the Public Health District health care providers and domestic violence shelters in Southwest Georgia
- \$48,000 to Positive Impact, Atlanta, GA, in 2012. To expand HIV counseling, testing and linkage services to high risk men
- \$48,000 to Northwest Georgia Healthcare Partnership, Dalton, GA, in 2012. To implement a Community Health Worker-Promotoras de Salud Program in Whitfield and Murray counties
- \$48,000 to Saint Josephs Mercy Care Services, Atlanta, GA, in 2012. To implement health promotion program designed to facilitate early detection and treatment of diabetes at Atlanta clinic

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## Mertz Gilmore Foundation

**Last Updated:** 2014-02-24

### At A Glance

(formerly Joyce Mertz-Gilmore Foundation)

218 E. 18th St.

New York, NY United States 10003-3694

Telephone: (212) 475-1137

Contact: Jay Beckner, Pres.

Fax: (212) 777-5226

E-mail: [info@mertzgilmore.org](mailto:info@mertzgilmore.org)

URL: [www.mertzgilmore.org](http://www.mertzgilmore.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$111,389,466

Total giving: \$5,735,905

## **EIN**

132872722

## **990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2003](#) [2002](#) [2001](#)

## **Background**

Incorporated in 1959 in NY.

In 1959, Joyce Mertz and her parents, LuEsther and Harold, established a family foundation called the Mertz Foundation. Joyce married Robert Wallace Gilmore in 1964, and the couple began managing the foundation's operations. Together with their colleague and friend, Bayard Rustin, they became strong advocates for peace and civil rights, which was reflected in their grantmaking. They also were committed passionately to the quality of life in New York City where they lived and made grants to performing arts institutions and to groups working to protect the city's environment. Their interest in the environment led them to support programs reaching beyond the city to include state, national and global issues as well. Initially, family members provided the foundation with funds on a yearly basis. However, when Joyce Mertz Gilmore died in 1974, her will provided for an endowment to the foundation. Robert Gilmore soon changed the foundation's name to the Joyce Mertz-Gilmore Foundation in her honor and memory. Robert Gilmore died in 1988, but not before he set the foundation on a new course by expanding the Board beyond the family. His heirs donated a generous portion of his estate to the foundation. In 2002, the Board of Directors changed the name of the foundation to the Mertz Gilmore Foundation to honor the memory of Robert Gilmore.

## **Limitations**

Giving on a national basis for Human Rights; also giving in the Northeast and New York City for Climate Change Solutions, and in New York City for Dance and Communities programs.

No support for sectarian religious concerns.

No grants to individuals, or for endowments, annual fund appeals, fundraising events, conferences, workshops, publications, film or media projects, scholarships, research, fellowships, or travel.

## **Purpose and Activities**

Current concerns include human rights, the environment, and New York City cultural, social, and civic concerns.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Climate Change Solutions**

The foundation's Climate Change Solutions program builds on longstanding Mertz Gilmore investments to understand climate change, promote more efficient energy usage, and develop renewable energy sources in the U.S. The program will consider grant requests in 3 categories: 1) Northeast regional efforts; 2) New York City; and 3) New constituencies and approaches for a national climate movement. For more information contact Rachel Young, tel.: 212-475-5581 or e-mail: [ryoung@mertzgilmore.org](mailto:ryoung@mertzgilmore.org).

### **NYC Communities**

As New York City struggles with an economic downturn, the impacts are especially difficult for low-income New Yorkers. The downturn is felt in the city's underserved communities in numerous ways, including: disappearing jobs, rising health care costs as a share of income, home foreclosures, less affordable housing, and new vulnerability to abusive practices in the low-income workplace. Faced with daunting challenges, community groups throughout the city use a variety of methods, including grassroots organizing and advocacy, to address human needs and strengthen communities. Often such groups take on multiple issues, recognizing the connections between community problems, and work in partnership with other non-profit organizations and city agencies. To support these efforts and to promote an equitable and sustainable city of vibrant communities, the foundation supports work in low-income neighborhoods that emerges from, and actively engages, local efforts while looking for opportunities to support collaborative campaigns. The program's grants fall into three categories: 1) community-based organizations (unfortunately, no new inquiries are being considered in this category); 2) Technical assistance providers; and 3) Collaborative campaigns. For more information contact Rachel Young, tel.: 212-475-5581 or e-mail: [ryoung@mertzgilmore.org](mailto:ryoung@mertzgilmore.org).

### **NYC Dance**

The foundation will continue to fund contemporary dance presenters located throughout the New York City's five boroughs. It's objective remains to support and invigorate the presenting field to serve New York City's artists and audiences. The program's grants fall into two categories: 1) Presenters: The foundation provides operating support for presenters of small to mid-sized dance companies in New York City. A presenter is an organization, or department or program of a larger organization, which facilitates exchanges between New York City's artists and audiences through creative performance opportunities. Grants are available only to groups that present contemporary dance (exclusively or as a part of multi-disciplinary programs); and 2) Advocacy/Support Services: On a limited basis and for opportunities that meet strategic concerns of the foundation, organizations may submit proposals for technical assistance projects. The foundation will consider discrete capacity building and support service projects. Prior to submitting a letter of inquiry, grantseekers are encouraged to contact Leah Krauss to discuss the nature of the proposed project, tel.: 646-723-2225, e-mail: [LKrauss@mertzgilmore.org](mailto:LKrauss@mertzgilmore.org).

## Fields of Interest

### Subjects

- Community development, citizen coalitions
- Community/economic development
- Community/economic development, equal rights
- Environment, energy
- Performing arts, dance

## Geographic Focus

- National
- New York

## Types of Support

- Continuing support
- General/operating support
- Matching/challenge support
- Program development
- Program-related investments/loans
- Seed money
- Technical assistance

## Publications

- Annual report

## Application Information

Please submit an online inquiry letter (not a full proposal) of no more than three pages describing the mission of the organization and the purpose of the request. The online inquiry form can be found on foundation web site. Staff will respond to all communications, and, if appropriate, invite a full proposal. Do not submit videos, CDs, audiocassettes, press clippings, books, or other materials unless they are requested. The foundation accepts the New York/ New Jersey Area Common Application Form and the New York/ New Jersey Common Report Form.

Application form required.

Initial approach: Online letter of inquiry submission

Copies of proposal: 1

Board meeting date(s): Apr. and Nov. for grant decisions

Deadline(s): See web site for current deadlines

Final notification: Within 2 weeks

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Joyce Mertz‡
- Robert Gilmore‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Mikki Shepard \*, Chair.
- Jay Beckner \*, Pres.
- Lukas Haynes, V.P.
- Rini Banerjee \*, Treas.
- Larry E. Condon \*, Chair. Emeritus

Affiliation(s):

*Lucerna Fund, Dir.*

- Elizabeth Burke Gilmore, Dir. Emeritus
- Jared Bernstein
- Laura Butzel
- Andrea Sholler

## Staff

### Number of Staff

7 full-time professional

3 full-time support

3 part-time support

## Key Staff

*Note: Does not include officers.*

- Marion Wong Cappiello, Sr. Dir., Finance and Admin.
- Leah Krauss, Prog. Off., Dance in New York City
- Mary E. Piccione, Grants and Systems Mgr.
- Rachel Young, Prog. Off., NYC Communities and Prog. Assoc., Climate Change Solutions

## Memberships

### Regional Associations of Grantmakers

- Philanthropy New York

### Affinity Groups

- Asian Americans/Pacific Islanders in Philanthropy
- Disability Funders Network
- Emerging Practitioners in Philanthropy
- Environmental Grantmakers Association
- Grantmakers In the Arts
- International Human Rights Funders Group
- National Committee for Responsive Philanthropy
- Peace and Security Funders Group

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$111,389,466 (market value)

Gifts received: \$4,540,000

Expenditures: \$8,002,861

Total giving: \$5,735,905

Qualifying distributions: \$7,142,557

Giving activities include:

\$5,735,905 for 191 grants (high: \$250,000; low: \$1,000)

## Online Communications

- [LinkedIn](#)
- [Grants List](#)

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$200,000 to Public Justice Foundation, Washington, DC, in 2011. For Rotating Fund
- \$160,000 to Make the Road New York, Brooklyn, NY, in 2011. For general support
- \$150,000 to Progressive America Fund, New York, NY, in 2011. For Center for Working Families: Green Jobs / Green New York Project
- \$140,000 to Fifth Avenue Committee, Brooklyn, NY, in 2011. For South Brooklyn Accountable Development Initiative
- \$100,000 to Supportive Housing Network of New York, New York, NY, in 2011. For Green Supportive Housing Initiative
- \$100,000 to Brooklyn Academy of Music, Brooklyn, NY, in 2011. For Dance Commissions and Presentations at BAM Richard B. Fisher Building
- \$100,000 to Danspace Project, New York, NY, in 2011. For general support
- \$70,000 to Pratt Center for Community Development, Brooklyn, NY, in 2011. For general support
- \$40,000 to Sustainable Markets Foundation, New York, NY, in 2011. For general support for Eco-Accountability Project in Alexandria, VA
- \$20,000 to Thelma Hill Performing Arts Center, Brooklyn, NY, in 2011. For Souls of Our Feet: People of Color Dance Festival

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## Blue Cross and Blue Shield of North Carolina Foundation

Last Updated: 2014-08-22

## At A Glance

P.O. Box 2291 , 5901 Old Chapel Hill Rd.  
Durham, NC United States 27702-2291  
Telephone: (919) 765-7347  
Contact: Jill Mallatratt, Assoc. Project Mgr.  
Fax: (919) 765-4243  
E-mail: [info@bcbsncfoundation.org](mailto:info@bcbsncfoundation.org)  
URL: [www.bcbsnc.com/foundation](http://www.bcbsnc.com/foundation)

## Type of Grantmaker

Company-sponsored foundation

## Financial Data

(yr. ended 2013-06-30)  
Assets: \$108,599,272  
Total giving: \$12,570,885

## EIN

562226009

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Additional Contact Information

E-mail for Jill Mallatratt: [jill.mallatratt@bcbsncfoundation.org](mailto:jill.mallatratt@bcbsncfoundation.org); Contact for Health of Vulnerable Populations: Katie Eyes, Sr, Prog. Mgr., tel.: (919) 765-4024, e-mail: [katie.eyes@bcbsncfoundation.org](mailto:katie.eyes@bcbsncfoundation.org); Contact for Healthy Active Communities: Jennifer MacDougall, Prog. Mgr., tel.: (919) 765-2128, e-mail: [jennifer.macDougall@bcbsncfoundation.org](mailto:jennifer.macDougall@bcbsncfoundation.org); Contact for Nonprofit Excellence: Valerie Stewart, Prog. Mgr., tel.: (919) 765-4514, e-mail: [valerie.stewart@bcbsncfoundation.org](mailto:valerie.stewart@bcbsncfoundation.org); Additional contact: Michael Gay, Opers. Mgr., tel. (919) 765-2826, e-mail: [michael.gay@bcbsncfoundation.org](mailto:michael.gay@bcbsncfoundation.org)

## Background

Established in 2000 in NC.

## Limitations

Giving primarily in areas of company operations in NC.

No support for religious organizations, individual sports teams, or organizations with the sole purpose of receiving goods and entitlements from other charitable organizations.

No grants to individuals, or for bricks and mortar, annual campaigns, political campaigns, religious purposes, endowments, advertising, or direct service or program-related costs including salaries, benefits, materials, or supplies.

## Purpose and Activities

The foundation supports programs designed to improve the health and well-being of North Carolinians. Special emphasis is directed toward programs designed to attain measurable results and sustained community impact.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Be Active Kids

Through Be Active Kids, the foundation and Be Active North Carolina, educates preschool children about the importance of eating healthy and staying alive through an interactive nutrition and physical program. The program includes a curriculum-based Be Active Kids kit with lesson plans, recipes, and activity ideas, storyboards, classroom posters, and a parent newsletter. Kits are free of charge to child-care providers in North Carolina when they attend a free Be Active Kids training. Visit URL <http://beactivekids.org/bak/Front/Default.aspx> for more information.

### Community Impact through Nonprofit Excellence

The foundation supports programs designed to strengthen the organizational capacity of nonprofit organizations in North Carolina by addressing program delivery and impact; fundraising and long-term financial stability; board leadership and contributions to the organization; operational efficiencies and infrastructure; and collaborations and partnerships with other organizations to better serve stakeholders. The initiative also includes the Healthy Community Institute, a two-day board and staff training program designed to build organizational capacity; 5 Good Ideas, a half-day interactive training for nonprofit leaders focusing on management skills and leadership development; and Community TIEs, and grant program honoring achievement in Technology, Innovation, and Evaluation.

### Health of Vulnerable Populations

The foundation supports programs designed to improve health outcomes for North Carolinians served by health care safety-

net organizations. Special emphasis is directed toward programs designed to increase quality, supply, and access to medical and dental care through coordination and continuity of care; increased number of providers serving vulnerable populations; increased provider use of evidence-based protocol and quality improvement measures; and enhanced operations and infrastructure of health care safety-net organizations. The foundation also supports programs designed to improve individual health, with a focus on diabetes, cardiovascular, and oral health; self-care and preventative behavior; reduced number of visits to emergency departments for non-urgent care; blood pressure control; A1C less than or equal to 7; and increased rate of completion of phase 1 dental treatment plan.

#### **Health of Vulnerable Populations - Equipment and Training Grant**

The foundation awards equipment and training grants to improve health outcomes for vulnerable populations and increase the capacity or scope of service of safety net providers. Special emphasis is directed toward projects that serve low-income, uninsured and medically underserved individuals. Grants are awarded for clinical equipment that will allow a safety net provider to deliver more care in the clinic setting rather than referring a patient out for care; equipment that enhances provider efficiency or quality of care; training that enhances quality of care or access to care for underserved populations; and training that supports team-based clinicians in operating at the top of their licensure. Grants range from \$1,000 to \$10,000.

#### **Healthy Active Communities**

The foundation supports programs designed to increase physical activity and access to healthy food through the use of the physical environment to create space, and places for physical activity and healthy food options; organizational and institutional policies that support increased activity and healthy eating; initiatives that increase physical activity and knowledge of healthy foods both during and upon completion of the program; and plans that address the built and policy environment for physical activity and healthy eating in local communities.

#### **Healthy Active Communities - Equipment Grants**

The foundation currently awards physical activity equipment grants of up to \$5,000 that result in increased physical activity. Grants are awarded for in-class physical activities; portable play/physical education equipment; portable exercise equipment; fixed exercise equipment; playground equipment; and materials to develop/extend a trail or to enhance an outdoor learning environment. Grants are limited to counties in North Carolina.

#### **Robert K. Greczyn, Jr. Community Health Center Leadership Award**

The foundation, in partnership with the North Carolina Community Health Center, annually honors a community health center professional who excels in service to his or her fellow North Carolinians in the field of public health and primary care. Recipients receive \$25,000 to advance the work of his or her community health center and a commissioned handcrafted vase.

### **Fields of Interest**

#### **Subjects**

- Athletics/sports, school programs
- Breast cancer
- Cancer
- Children/youth, services
- Dental care
- Diabetes
- Family services, parent education
- Food services
- Health care
- Health care, clinics/centers
- Health care, patient services
- Heart & circulatory diseases
- Leadership development
- Medical care, community health systems
- Nutrition
- Public health
- Public health, obesity
- Public health, physical fitness
- Rural development

#### **Population Groups**

- Aging
- Disabilities, people with
- Economically disadvantaged

#### **Geographic Focus**

- North Carolina

#### **Types of Support**

- Capital campaigns
- Conferences/seminars
- Consulting services

- Continuing support
- Curriculum development
- Equipment
- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Grants list
- IRS Form 990 or 990-PF printed copy available upon request
- Program policy statement

## Application Information

A full proposal may be requested at a later date for Health of Vulnerable Populations and Healthy Active Communities. Support is limited to 1 contribution per organization during any given year.

Application form required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Copy of most recent annual report/audited financial statement/990
3. Listing of board of directors, trustees, officers and other key people and their affiliations
4. Copy of current year's organizational budget and/or project budget
5. Listing of additional sources and amount of support

Initial approach: Complete online application

Deadline(s): Varies - visit website for deadline announcements

Final notification: Varies

Additional information: Financial documentation required is based on the organization's size and type.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Blue Cross and Blue Shield of North Carolina, Inc.
- Golden Leaf Foundation

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- J. Bradley Wilson \*, Chair.  
Affiliation(s):  
*Blue Cross and Blue Shield of North Carolina, Inc., Pres. and C.E.O.*
- Kathy Higgins, Pres.  
Affiliation(s):  
*Blue Cross and Blue Shield of North Carolina, Inc., V.P., Corporate Affairs*
- Danielle Breslin, V.P., Ops.  
Affiliation(s):  
*Blue Cross and Blue Shield of North Carolina, Inc., V.P., Operations*
- Stran Summers, V.P., Finance
- N. King Prather, Secy.  
Affiliation(s):  
*Blue Cross and Blue Shield of North Carolina, Inc., Sr. V.P., Genl. Counsel, and Corp. Secy.*
- Steve Cherrier, Treas.
- Lisa Carey
- Daniel E. Glaser  
Affiliation(s):  
*Blue Cross and Blue Shield of North Carolina, C.F.O.*
- L. Steven Nelson
- Maureen O'Connor  
Affiliation(s):

*Blue Cross and Blue Shield of North Carolina, Inc., C.A.O., Genl. Counsel, and Secy.*

- Gerald Petkau  
Affiliation(s):  
*Blue Cross and Blue Shield of North Carolina, Inc., Sr. V.P. and C.F.O.*
- John T. Roos

## Staff

### Key Staff

*Note: Does not include officers.*

- Mark Dessauer, Dir., Comms.
- Katie Eyes, Sr. Prog. Off., Health of Vulnerable Populations
- Michael Gay, Ops. Mgr.
- Jennifer MacDougall, Sr. Prog. Off., Healthy Active Communities
- Jill Mallatratt, Assoc. Project Mgr.
- Valerie Stewart, Prog. Off., Community Impact through Nonprofit Excellence

## Memberships

### Regional Associations of Grantmakers

- North Carolina Network of Grantmakers
- Southeastern Council of Foundations

### Associations and Other Philanthropic Organizations

- North Carolina Center for Nonprofits

## Financial Data

Year ended 2013-06-30

Assets: \$108,599,272 (market value)

Expenditures: \$14,166,230

Total giving: \$12,570,885

Qualifying distributions: \$13,105,245

Giving activities include:

\$12,570,885 for 100 grants (high: \$4,000,000; low: \$1,500)

\$518,352 for 4 foundation-administered programs

## Online Communications

- [Grantee Profiles](#)
- [RSS Feed](#)
- [Be Active Kids on Facebook](#)
- [Grantee Map](#)
- [Twitter](#)
- [Grants Database](#)
- [Multimedia](#)

## Additional Location Information

County: Durham

Metropolitan area: Durham, NC

Congressional district: North Carolina District 01

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$2,000,000 to North Carolina Association of Free Clinics, Winston-Salem, NC, in 2012. To support existing NCAFC member free clinics and pharmacies and the creation of new free clinics in underserved counties. The focus is on stability and sustainability of all member clinics
- \$1,131,000 to North Carolina Department of Agriculture and Consumer Services, Raleigh, NC, in 2012. To increase the number of school districts participating in the North Carolina Farm to School Program by expanding the capacity of the Department through the purchase of five tractor-trailers
- \$1,000,000 to University of North Carolina at Asheville Foundation, Asheville, NC, in 2012. To continue partnership that seeks to discover best practices about health and wellness and broadly communicating those to the public through undergraduate research, internships, and equipment support for North Carolina Center for Health and Wellness
- \$1,000,000 to North Carolina Partnership for Children, Raleigh, NC, in 2012. To improve the health of young children, ages 0-5, and child care workers through a statewide strategy of comprehensive coordinated early childhood obesity prevention, outreach and technical assistance that will address change at the individual, programmatic, built environment and policy levels



- \$1,000,000 to North Carolina State University, Raleigh, NC, in 2012. To increase access to healthy food through establishment of a statewide local food system that serves as a sustainable, replicable model to drive improved health and rural economic development
- \$855,000 to Youth Empowered Solutions, Raleigh, NC, in 2012. To increase effectiveness of youth advocates in obesity prevention and expand organizational capacity of YES to sustain youth advocacy strategies through organizational restructuring and implementation of a fee-for-service business model
- \$150,000 to Farmer Foodshare, Chapel Hill, NC, in 2012. For core mission investment to build capacity and move organizational infrastructure from start-up to sustainable for future programmatic growth in areas of supporting farmers, feeding communities healthy food and creating food-access jobs
- \$140,400 to MGR Foundation, Chicago, IL, in 2012. To increase access to healthy food by implementing GREEN Community Schools and promoting environmental awareness and fully integrate sustainable practices in struggling local communities in the Charlotte-Mecklenburg School District
- \$138,543 to East Carolina University, Greenville, NC, in 2012. To refine and package MATCH (Motivating Adolescents with Technology to Choose Health) program in an effort to decrease the prevalence of obesity in ten rural eastern North Carolina middle schools. Refinement and packaging will allow the easy replication of the program statewide
- \$99,809 to Appalachian Sustainable Agriculture Project, Asheville, NC, in 2012. To increase access to healthy, local food in Ashe, Henderson, and Macon counties by improving or developing systems for food procurement, distribution, and marketing systems as well as assisting educational, institutional and retail sites to access and serve this food on a long-term sustainable basis

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## The Prudential Foundation

**Last Updated:** 2013-11-04

### At A Glance

751 Broad St., 15th Fl. , Prudential Plz.  
 Newark, NJ United States 07102-3777  
 Telephone: (973) 802-4070  
 Contact: Lata Reddy, V.P., Corp. Social Responsibility  
 E-mail: [community.resources@prudential.com](mailto:community.resources@prudential.com)  
 URL: [www.prudential.com/view/page/public/12182](http://www.prudential.com/view/page/public/12182)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)  
 Assets: \$107,236,777  
 Total giving: \$26,859,858

### EIN

222175290

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2000](#)

### Background

Incorporated in 1977 in NJ.

### Limitations

Giving primarily in areas of company operations, with emphasis on Phoenix, AZ, Los Angeles, CA, Hartford, CT, Jacksonville, FL, Dubuque, IA, Chicago, IL, New Orleans, LA, Minneapolis, MN, Newark, NJ, New York, NY, Philadelphia and Scranton, PA, and in Brazil, India, Japan, Korea, Mexico, and Taiwan; giving also to national organizations.

No support for discriminatory organizations or labor, religious, fraternal, or athletic organizations, or single-disease health groups.

No grants to individuals or for goodwill advertising.

### Purpose and Activities

The foundation supports organizations involved with education; economic development; and arts and culture.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Arts and Culture

The foundation supports programs designed to contribute to the local economy and provide diverse opportunities for

individuals to experience and participate in the arts.

### **Economic Development**

The foundation supports programs designed to transform neighborhoods distressed by declining populations, property values, job loss, and poverty; provide low-income families with assets and workforce development; promote small business development to drive economic growth and job creation; and promote community assets like parks, schools, medical and cultural institutions, and transit networks to bring needed resources and services to the community.

### **Education**

The foundation supports programs designed to transform the public education system to improve long-term social and economic outcomes for children; develop strong educational leaders to manage school systems, schools, and classrooms; improve academic achievement through motivation and engagement in the classroom; and promote public and parent participation to sustain education reform efforts.

### **Employee Matching Gifts**

The foundation matches contributions made by full-time employees, retirees, agents, and directors of Prudential and its subsidiaries to nonprofit organizations on a two-for-one basis from \$25 to \$100 and on a one-for-one basis from \$100 to \$5,000 per employee, per year.

### **Prudential CARES Volunteer Grants**

The foundation awards grants of up to \$5,000 to nonprofit organizations with which employees, retirees, and agents of Prudential volunteer at least 40 hours per year.

## **Fields of Interest**

### **Subjects**

- Arts
- Arts education
- Community development, neighborhood development
- Community development, small businesses
- Economic development
- Education
- Education, reform
- Employment, services
- Leadership development

### **International Interests**

- Brazil
- India
- Japan
- Mexico
- North Korea
- South Korea
- Taiwan

### **Population Groups**

- Economically disadvantaged
- Youth

## **Geographic Focus**

- Arizona
- California
- Connecticut
- Florida
- Iowa
- Illinois
- Louisiana
- Minnesota
- New Jersey
- New York
- Pennsylvania

## **Types of Support**

- Capital campaigns
- Emergency funds
- Employee matching gifts
- General/operating support
- Management development/capacity building
- Mission-related investments/loans

- Program development
- Program-related investments/loans
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report (including application guidelines)

## Application Information

The foundation accepts the New York/ New Jersey Area Common Application Form and the New York/ New Jersey Common Report Form. Additional information may be requested at a later date. Video submissions are not encouraged.

Application form required.

Applicants should submit the following:

1. Results expected from proposed grant
2. Population served
3. Copy of IRS Determination Letter
4. Geographic area to be served
5. How project's results will be evaluated or measured
6. Detailed description of project and amount of funding requested
7. Contact person
8. Copy of current year's organizational budget and/or project budget
9. Listing of additional sources and amount of support

Initial approach: Complete online application

Board meeting date(s): Feb., June, and Oct.

Deadline(s): None

Final notification: Within 60 days

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- The Prudential Insurance Co. of America
- Prudential Equity Group, LLC

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Sharon C. Taylor \*, Chair.  
Affiliation(s):  
*The Prudential Insurance Co. of America, Sr. V.P., Corp. Human Resources*
- Lata N. Reddy, Pres.  
Affiliation(s):  
*Prudent Financial, V.P., Corporate Social Responsibility*
- Shane Harris, V.P. and Secy.
- James W. McCarthy, Treas.
- Brian Cloonan, Cont.
- Gilbert F. Casellas
- Constance J. Horner
- Barbara G. Koster  
Affiliation(s):  
*Prudential Fdn., Inc., Sr. V.P. and C.I.O.*
- John R. Strangfeld, Jr.  
Affiliation(s):  
*The Prudential Insurance Co. of America, Chair. and C.E.O.*

## Staff

### Number of Staff

5 full-time professional

4 full-time support

### Key Staff

*Note: Does not include officers.*

- Rene O. Deida, Prog. Off.

- Sarah Keh, Prog. Off.
- Daniel McNeal, Prog. Off.
- Kimberly Ostrowski, Dir.
- Julia Roca, Grant Assoc.
- Candy Torres, Grant Assoc.

## Memberships

### Regional Associations of Grantmakers

- Council of New Jersey Grantmakers

### Affinity Groups

- Grantmakers for Education
- Grantmakers for Effective Organizations
- Mission Investors Exchange

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Independent Sector

## Financial Data

Year ended 2012-12-31

Assets: \$107,236,777 (market value)

Gifts received: \$30,066,825

Expenditures: \$27,422,063

Total giving: \$26,859,858

Qualifying distributions: \$33,074,610

Giving activities include:

\$20,191,025 for 858 grants (high: \$1,000,000; low: \$250)

\$221,294 for 558 grants to individuals

\$6,447,539 for 11209 employee matching gifts

\$5,864,502 for 3 loans/program-related investments

## Additional Location Information

County: Essex

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$200,000 to La Casa de Don Pedro, Newark, NJ, in 2012. For capacity building and general operating support
- \$75,000 to BoardSource, Washington, DC, in 2012. For Prudential Leadership Awards for Exceptional Nonprofit Boards
- \$50,000 to Citizen Schools New Jersey, Newark, NJ, in 2012. For Managing Challenging Behavior
- \$50,000 to Save the Children Federation, Westport, CT, in 2012. For Disaster Relief Payments - Hurricane Sandy
- \$40,000 to ArtPride New Jersey Foundation, Burlington, NJ, in 2012. For Arts/Business Partnership
- \$15,000 to Commission on Economic Opportunity of Luzerne County, Wilkes Barre, PA, in 2012. For CEO/Weinberg NE Regional Food Bank

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## The Arthur Foundation

**Last Updated:** 2014-01-22

### At A Glance

(formerly MacNeal Health Foundation)

19 Riverside Rd., Ste. 6

Riverside, IL United States 60546-2606

URL: [www.arthurfndn.org](http://www.arthurfndn.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Health conversion foundation

## Financial Data

(yr. ended 2012-12-31)  
Assets: \$104,003,022  
Total giving: \$7,266,170

## EIN

364324067

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Background

Established in 2000 in IL; converted from MacNeal Memorial Hospital; changed its name to The Arthur Foundation in 2006.

The Arthur Foundation (formerly the MacNeal Health Foundation) is committed to the tradition of community service first established by Dr. Arthur MacNeal at the turn of the 20th century. Founded at the beginning of the 21st century, the foundation strives to be an agent of positive change through its support of high-quality, leading-edge programs in education, healthcare and medical research.

## Limitations

Giving primarily in Berwyn and Cicero, IL for education grants. Health care grants for western Cook County, IL.

No support for organizations without charitable status, political parties or candidates, sponsorship of service clubs, sport teams, fraternal organizations, advocacy or lobby groups, or for foreign organizations.

No grants to individuals, or for operating budgets for pre-existing programs, organization overhead expenses not directly applicable to a grant project, salaries for participants with faculty appointments at institutions of higher learning, programs normally funded by governmental agencies, fundraising events (including advertising, tickets, raffles and dinners), debt reduction, stand-alone research, individual scholarship support, conferences/seminars, books/periodicals, memberships, travel expenses not connected to a funded program, any attempt to influence legislation, sectarian religious activities, foreign expenditures, telephone solicitations; no loans.

## Purpose and Activities

The foundation aims to improve the health of the community by supporting accessible, affordable and appropriate health services to vulnerable populations. The foundation recognizes that actual health care or health related service is only one of the factors determining the health status of individuals and families of these same communities. The health of the people is also determined by the educational status of its people, especially its youth. Therefore, the foundation will also consider grant requests that foster and improve education and educational opportunities for the citizens of the area it seeks to serve.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Initiative for Educational Excellence

The foundation has embarked upon an initiative focused on students residing in the city of Berwyn, Illinois and the town of Cicero, Illinois. The initiative seeks to: 1) encourage college attendance; 2) raise the level of academic achievement for both high school and grammar school students; 3) lower the drop out and truancy rates and raise the graduation rates; and 4) provide assistance in teacher recruitment, retention and education. Grants will be made only to agencies that have been pre-selected by the foundation to assist in the initiative or, in some instances, to agencies that have submitted unsolicited requests (letters of inquiry) clearly demonstrating that their proposed program will advance the purposes of the initiative.

## Fields of Interest

### Subjects

- Education
- Education, ESL programs
- Health care
- Medical school/education
- Nursing school/education

### Population Groups

- Adults
- Blind/visually impaired
- Children
- Children/youth
- Deaf/hearing impaired
- Disabilities, people with
- Economically disadvantaged
- Hispanics/Latinos
- Immigrants/refugees

- Mentally disabled
- Physically disabled
- Young adults

## Geographic Focus

- Illinois

## Types of Support

- Building/renovation
- Continuing support
- Curriculum development
- Endowments
- Equipment
- Fellowships
- General/operating support
- Income development
- Internship funds
- Management development/capacity building
- Matching/challenge support
- Professorships
- Program development
- Program evaluation
- Research
- Scholarship funds

## Publications

- Financial statement

## Application Information

Unsolicited requests for funds not accepted.

Application form not required.

Board meeting date(s): Semi-annually

## Officers and Board Members

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Luke McGuinness \*, Chair.
- William J. Hank \*, Vice-Chair. and V.P.  
Affiliation(s):  
*Vibern Foundation, Tr.*
- Michael P. Kenahan \*, Pres.
- Jeffrey P. Huml, M.D., Secy.  
Affiliation(s):  
*Central DuPage Hospital, Secy. and Dir.*
- Raymond Nootens, M.D., Treas.
- Rolf Gunnar, M.D.
- Allen B. Hank  
Affiliation(s):  
*Farnham Foundation, Tr.*  
*Gabriel Foundation, Tr.*
- Roxanne Martino
- Carmen Velasquez  
Affiliation(s):  
*Alivio Medical Centers, C.E.O.*

## Memberships

### Regional Associations of Grantmakers

- Donors Forum (IL)

### Affinity Groups

- Grantmakers for Education

## Financial Data

Year ended 2012-12-31

Assets: \$104,003,022 (market value)  
Expenditures: \$8,622,839  
Total giving: \$7,266,170  
Qualifying distributions: \$7,764,772  
Giving activities include:  
\$7,266,170 for 16 grants (high: \$2,000,000; low: \$10,000)

### Additional Location Information

County: Cook  
Metropolitan area: Chicago-Naperville-Joliet, IL-IN-WI  
Congressional district: Illinois District 04

### Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$2,000,000 to University of Notre Dame, Notre Dame, IN, in 2012. To endow fellowships for Masters of Business Administration (MBA) students
- \$1,250,000 to University of Notre Dame, Notre Dame, IN, in 2012. For Masters of Business Administration (MBA) in Executive Education
- \$750,000 to University of Notre Dame, Notre Dame, IN, in 2012. For assessment for Berwyn/Cicero, IL and leadership identification, capacity building and education advice
- \$738,400 to Loyola University of Chicago, Chicago, IL, in 2012. For enhancements for nursing faculty and building
- \$500,000 to University of Notre Dame, Notre Dame, IN, in 2012. For fellowships for Masters of Nonprofit Administration (MNA) students
- \$500,000 to Loyola University Health System, Maywood, IL, in 2012. To construct Nursing School
- \$480,000 to Loyola University of Chicago, Chicago, IL, in 2012. For LUChoice program and Center for Catholic School Effectiveness
- \$250,000 to Northeastern Illinois University, Chicago, IL, in 2012. To implement Initiative for Education Excellence in Berwyn and Cicero, IL
- \$250,000 to University of Notre Dame, Notre Dame, IN, in 2012. To endow Chair in Nonprofit Administration
- \$30,000 to Seguin Services, Cicero, IL, in 2012. For Entrepreneur Education programs for developmentally disabled

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## Blue Cross Blue Shield of Massachusetts Foundation, Inc. for Expanding Healthcare Access

**Last Updated:** 2014-01-14

### At A Glance

(formerly Wellchild, the Foundation of Health for Life)  
Landmark Ctr. , 401 Park Dr.  
Boston, MA United States 02215-3325  
Telephone: (617) 246-3744  
Contact: Celeste Reid Lee, Interim Pres.  
Fax: (617) 246-3992  
E-mail: [info@bluecrossmafoundation.org](mailto:info@bluecrossmafoundation.org)  
URL: [www.bcbsmafoundation.org](http://www.bcbsmafoundation.org)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$103,240,974  
Total giving: \$3,512,006

### EIN

043148824

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2008](#) [2007](#) [2006](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Tel. and e-mail for Celeste Reid Lee: (617) 246-8406, [celeste.lee@bcbsma.com](mailto:celeste.lee@bcbsma.com); Additional contact: Jennifer Lee, Grantmaking Prog. Mgr., [Jennifer.Lee@bcbsma.com](mailto:Jennifer.Lee@bcbsma.com); E-mail for Massachusetts Institute for Community Health Leadership: [mmccorma@hsph.harvard.edu](mailto:mmccorma@hsph.harvard.edu)

## **Background**

Established in 2001 in MA; status changed to a private foundation in 2006.

## **Limitations**

Giving primarily in areas of company operations in MA.

No grants for events or sponsorships.

## **Purpose and Activities**

The foundation seeks to expand access to health care by working with public and private organizations to broaden health coverage and reduce barriers to care.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Catalyst Fund**

The foundation awards grants to support one-time capacity-building expenses for organizations that serve the health care needs of uninsured and low-income people. The program is designed to strengthen an organization's ability to expand access to health care. Grants range from \$1,000 to \$5,000.

### **Connecting Consumers with Care**

The foundation awards two-year grants of up to \$40,000 to community-based organizations, community health centers, and hospital-based programs designed to help consumers enroll in and maintain access to coverage; address system-level barriers through collaboration; and educate and equip consumers to utilize the healthcare system more effectively.

### **Cost and Affordability Policy and Research Grants**

The foundation supports programs designed to promote research, policy analysis, and evaluation of health care costs and spending. Special emphasis is directed toward the creation of information that guides policy makers; and guide delivery systems based programs designed to reduce or slow the growth in health care spending. Grants range from \$30,000 to \$150,000.

### **Health Coverage Fellowship**

Through the Health Coverage Fellowship, the foundation trains members of the media to cover critical healthcare issues. The program focuses on issues ranging from insuring the uninsured to mental illness, backups in emergency rooms, ethnic and economic disparities in the delivery of care, and environmental health. The fellowship is housed at Babson College's Center for Executive Education in Wellesley, and brings journalists together with leading health officials, policy makers, and researchers. The fellows also learn first-hand how the system works, from joining mental health case workers patrolling the streets at night to riding a Medflight helicopter. The foundation selects ten journalists each year from across the country for an intensive nine days and nights of training.

### **Making Health Care Affordable: Preserving Access and Improving Value**

The foundation awards up to three years of funding to programs designed to demonstrate substantive cost containment while maintaining access and quality of care. This program is closed until Summer 2014.

### **Massachusetts Institute for Community Health Leadership**

Through the Massachusetts Institute of Community Health Leadership initiative, the foundation builds leadership capacity among healthcare organizations in the Commonwealth that serve the needs of low-income and uninsured residents. The 18-day educational program is designed to help those with leadership potential increase their own personal impact, strengthen their effectiveness in their organization, and enhance the organization's influence in the healthcare system.

### **Strengthening the Voice for Access**

The foundation awards two-year grants of up to \$70,000 to initiatives designed to promote the interests of the uninsured, underinsured, and underserved through strategic advocacy. The program is designed to strengthen community-based policy activities, increase citizen participation in public policy development, and promote collaboration among state policy and advocacy organizations on healthcare coverage for vulnerable populations, and healthcare affordability.

## **Fields of Interest**

### **Subjects**

- Health care
- Health care, clinics/centers
- Health care, equal rights
- Health care, insurance
- Health care, public policy
- Health care, research
- Hospitals (general)
- Leadership development
- Public health
- Public health, environmental health



## Geographic Focus

- Massachusetts

## Types of Support

- Continuing support
- Fellowships
- Management development/capacity building
- Program development
- Sponsorships

## Publications

- Application guidelines
- Grants list
- IRS Form 990 or 990-PF printed copy available upon request
- Program policy statement

## Application Information

Applicants for the Catalyst Fund and the Massachusetts Institute for Community Health Leadership should submit 5 copies of the application. Letters of inquiry should be no longer than 2 pages. Organizations receiving support are asked to submit an interim report and a final report.

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Listing of board of directors, trustees, officers and other key people and their affiliations
3. Detailed description of project and amount of funding requested
4. Copy of current year's organizational budget and/or project budget

Initial approach: Download application and mail for Catalyst Fund and Massachusetts Institute for Community Health Leadership; download application and mail to application address for Health Coverage Fellowship; download letter of inquiry form and mail for Connecting Consumers with Care, Cost and Affordability Grants, and Strengthening the Voice for Access

Deadline(s): Varies for Catalyst Fund, Massachusetts Institute for Community Health Leadership, Connecting Consumers with Care, Strengthening the Voice for Access, and Health Coverage Fellowship; Sept. 7 for Cost and Affordability Grants

Final notification: 6 to 7 weeks for Catalyst Fund

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Blue Cross and Blue Shield of Massachusetts, Inc.
- Robert Wood Johnson Foundation
- CT Health Foundation
- Bingham Betterment Fund
- Ottauquechee Health Foundation
- Cox Charitable Lead Trust
- Tufts

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Philip W. Johnston \*, Chair.  
Affiliation(s):  
*Philip W. Johnston Associates, Pres.*  
*Citizens Programs Corporation, Exec. Dir.*  
*Massachusetts Health Policy Forum, Chair.*
- Robert Meenan, M.D. \*, Vice-Chair.  
Affiliation(s):  
*Boston University School of Public Health, Dean*  
*Prof., Health Svcs., and Dir., CDC Prevention Research Ctr.*  
*Boston University School of Medicine, Chair. and Prof., Socio-Medical Sciences and Community Medicine*  
*and Prof., Medicine*  
*American Society for Clinical Investigation, Member*  
*Arthritis Foundation, Tr.*  
*U.S. Agency for Healthcare Research and Quality, Member, Natl. Advisory Council*
- Audrey Shelto, Pres.
- Helen Caulton-Harris

Affiliation(s):

*Springfield Department of Health &  
Human Services, Dir.*

*Partners for a Healthier Community, V.P.*

*University of Massachusetts School of Nursing, Member, Advisory Committee*

*AAA Automobile Club, Dir.*

*Willie Ross School for the Deaf, Member*

*Robert M. Hughes Academy Charter School, Tr.*

*Links, Inc., Member, Greater Springfield Chapter*

*Carl L. Talbot VFW Ladies' Auxilliary, Member*

*City of Springfield Veterans Affairs Committee, Member*

*Springfield College, Faculty Member*

■ Andrew Dreyfus

Affiliation(s):

*Blue Cross Blue Shield of Massachusetts, Pres. and C.E.O.*

■ Barbara Ferrer, Ph.D., MPH

Affiliation(s):

*Boston Public Health Commission, Exec. Dir.*

■ Matt Fishman

Affiliation(s):

*Partners Healthcare Systems Inc., V.P., Community Health*

*Blue Cross Blue Shield Foundation of Massachusetts, Board Member*

*Institute for Community Health, Board Member*

■ Milton Glass

Affiliation(s):

*Blue Cross Blue Shield of Massachusetts, Chair. Emeritus*

*Northeastern University, Adjunct Prof., Finance*

*The Forsyth Institute, Board Member*

*Jaw, Joints, and Allied Musculo-Skeletal Disorders Foundation, Co-Founder*

■ James W. Hunt, Jr.

Affiliation(s):

*Massachusetts League of Community Health Centers, C.E.O. and Pres.*

*Suffolk University, Adjunct Prof., Sawyer School of Mgmt.*

*American Society of Association Executives, Member*

■ Rachel Kaprielian

Affiliation(s):

*Massachusetts State Legislature, State Rep.*

*Massachusetts Registry of Motor Vehicles, Registrar*

■ Nick Littlefield

Affiliation(s):

*Foley, Hoag LLP, Partner and Co-Chair., Govt. Strategies Group*

■ Richard C. Lord

Affiliation(s):

*Associated Industries of Massachusetts, C.E.O. and Pres.*

*Greater Boston Catholic Charities, Member, Advisory Board*

*Northeastern University, Board member*

*Massachusetts Department of Medical Assistance, Member, Advisory Board*

*Children's Trust Fund, Board Member*

*Massachusetts Association for Mental Health, Board Member*

*Massachusetts Workforce Training Fund, Member, Advisory Panel*

*Massachusetts Healthcare Purchasers Group, Member*

■ Robert Restuccia

Affiliation(s):

*Community Catalyst, Exec. Dir.*

*Children in Medicaid, Member, Advisory Comm.*

*Blue Cross Blue Shield of Massachusetts, Dir.*

■ Charlotte S. Yeh, M.D., FACEP

Affiliation(s):

*Centers for Medicaid and Medicare Services, Regional Administrator*

*Massachusetts Medical Society, Chair., Comms. Committee*

*AARP, Chief Medical Officer*

## Staff

### Key Staff

*Note: Does not include officers.*

- Phillip O. Gonzalez, Dir., Grantmaking
- Anna Gosline, Dir., Policy and Research
- Elizabeth Guyott, Exec. Asst.
- Jessica Larochelle, Dir., Evaluation and Strategic Initiatives
- Celeste Reid Lee, Sr. Dir., Grantmaking
- Jennifer Lee, Grantmaking Prog. Mgr.
- Michael McCormack, Dir., Massachusetts Institute for Community Health Leadership
- Evelyn Monteiro, Coord., Admin. and Grants Management
- Kate Nordahl, Dir., Massachusetts Medicaid Policy Institute
- Elisabeth Rodman, Policy Analyst
- Larry Tye, Dir., Health Coverage Fellowship

## Memberships

### Regional Associations of Grantmakers

- Associated Grant Makers

## Financial Data

Year ended 2012-12-31

Assets: \$103,240,974 (market value)

Gifts received: \$6,796,266

Expenditures: \$7,991,487

Total giving: \$3,512,006

Qualifying distributions: \$7,615,780

Giving activities include:

\$3,512,006 for grants

## Online Communications

- [RSS Feed](#)
- [Grants Database](#)

## Additional Location Information

County: Suffolk

Metropolitan area: Boston-Cambridge-Quincy, MA-NH

Congressional district: Massachusetts District 07

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## Foundation for Child Development

**Last Updated:** 2014-03-13

### At A Glance

295 Madison Ave., 40th Fl.

New York, NY United States 10017-6304

Telephone: (212) 867-5777

Contact: Mark Bogosian, Comms. and Grants Off.

Fax: (212) 867-5844

E-mail: [info@fcd-us.org](mailto:info@fcd-us.org)

URL: [www.fcd-us.org](http://www.fcd-us.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2013-03-31)

Assets: \$99,997,180

Total giving: \$2,515,945

### EIN

131623901

### 990

[2013](#) [2012](#) [2011](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Incorporated as a voluntary agency in 1900 in NY and established as the Association for the Aid of Crippled Children in 1908; current name adopted in 1972, affirming a broader focus on children at risk.

The association was publicly supported by voluntary contributions until 1944, when substantial funds were received from the estate of Milo Belding as a testament to his wife, Annie K. Belding, who had given many years of devoted service to the association. In its early years, the association's name reflected its actual activities, which centered on teaching crippled children, but it soon defined aid to these children and their families more broadly and often included material help. The association's work changed again when nursing in the home and school became the main focus. As these services became community supported and as the funds of the Belding estate became available, the association shifted its attention to the prevention of causes of handicapping. From the early 1950s until the early 1970s, most funds supported research into genetically based disorders and fetal abnormalities. Recognizing the nature of its evolving program, the association changed its name in 1972 to the Foundation for Child Development. Today, its principal interest is childhood poverty, with grants focused on child development research and other research concerning young children and their families, public policy affecting children and families, and in New York City, program development and programs that help to translate research knowledge into policies and practices that affect the daily lives of children and their families. The foundation is governed by a board of directors. The board meets three times a year to determine foundation policy and current program expenditures.

## Limitations

Giving on a national basis.

No support for the direct provision of pre-kindergarten education, child care, or health care.

No grants for capital campaigns, endowments, or for the purchase, construction, or renovation of buildings.

## Purpose and Activities

The Foundation for Child Development (FCD) is a national, private philanthropy dedicated to the principle that all families should have the social and material resources to raise their children to be healthy, educated and productive members of their communities. The foundation seeks to understand children, particularly the disadvantaged, and to promote their well-being. The foundation believes that families, schools, nonprofit organizations, businesses and government at all levels share complementary responsibilities in the critical task of raising new generations.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### PreK-3rd

PreK-3rd is a national initiative to transform how children ages three to eight learn in schools. The initiative focuses on building strong connections between learning experiences across these critical years. PreK-3rd approaches require that educational standards, curricula, assessment, instruction, and professional development are strongly aligned across high-quality PreK, Kindergarten, First, Second and Third Grades.

### Young Scholars Program

This program supports policy- and practice-relevant research on the development and learning needs of the nation's young children growing up under conditions of poverty and low-income. The foundation believes that early learning is a solid first step towards lifelong development and that promoting research in this area, conducted in a holistic and culturally sensitive manner, will help address the disparities in children's outcomes. This program encourages applications from scholars who are: 1) from historically disadvantaged or underrepresented groups, (e.g. first-generation college graduates, and those from low-income communities); and 2) scholars who represent a variety of disciplines and methods, given that mental, physical, health, social, economic, institutional, and community factors impact early learning and child development. Eligible researchers will have received their doctoral degrees (e.g., Ph.D., J.D., Ed.D., Psy.D., M.D.) within seven years of application submission, ten years for physician applicants.

## Fields of Interest

### Subjects

- Education, early childhood education
- Education, reform
- Public policy, research

### Population Groups

- Children
- Immigrants/refugees

## Geographic Focus

- National

## Types of Support

- Conferences/seminars
- Continuing support

- Endowments
- Fellowships
- General/operating support
- Program development
- Publication
- Research
- Seed money
- Technical assistance

## Publications

- Annual report
- Grants list
- Informational brochure
- Newsletter
- Occasional report
- Program policy statement

## Application Information

Unsolicited requests for funds not accepted.

Application form not required.

Board meeting date(s): Mar., June, and Oct.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Milo M. Belding‡
- Annie K. Belding‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- David Lawrence, Jr. \*, Chair.  
Affiliation(s):  
*The Early Childhood Initiative Foundation, President*  
*The Children's Movement of Florida, Chair.*
- Margaret Beale Spencer, Ph.D. \*, Vice-Chair.  
Affiliation(s):  
*University of Chicago, Marshall Field IV Prof. of Urban Education, Dept. of Comparative Human Devel., and Committee on Education*
- Jessica Chao, Interim C.E.O. and C.O.O.
- Ruby Takanishi, Ph.D. \*, Pres.
- Hirokazu Yoshikawa \*, Secy.  
Affiliation(s):  
*NYU Steinhardt School of Culture, Education, and Human Development, Courtney Sale Ross University Prof. of Globalization and Education*
- Ellen Berland Gibbs, Treas.  
Affiliation(s):  
*EBG, Inc., President*
- Eugene E. Garcia
- Walter Giles  
Affiliation(s):  
*Beck, Mack & Oliver, LLC, Partner*
- Robert P. Morgenthau  
Affiliation(s):  
*Spears Abacus Advisors, LLC, Principal*
- Andrew D. Racine, M.D., Ph.D.  
Affiliation(s):  
*Montefiore Medical Center, Sr. V.P., Chief Medical Officer*
- Margarita Rosa  
Affiliation(s):  
*Grand Street Settlement, Exec. Dir.*
- Joseph Youngblood, II  
Affiliation(s):  
*The John S. Watson School of Public Service and Continuing Studies, Thomas Edison State College, Vice-Provost and*

## Staff

### Number of Staff

5 full-time professional  
1 part-time professional  
1 part-time support

### Key Staff

*Note: Does not include officers.*

- Anya Bailey, Prog. Assoc.
- Mark Bogosian, Comms. and Prog. Off.
- Annette Chin, Consultant
- Donald J. Hernandez, Sr. Advisor

## Memberships

### Regional Associations of Grantmakers

- Philanthropy New York

### Affinity Groups

- Grantmakers Concerned with Immigrants and Refugees
- Grantmakers for Children, Youth and Families
- Grantmakers for Education
- The Communications Network

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2013-03-31

Assets: \$99,997,180 (market value)

Gifts received: \$21,000

Expenditures: \$5,158,021

Total giving: \$2,515,945

Qualifying distributions: \$4,399,367

Giving activities include:

\$2,515,945 for 17 grants (high: \$726,295; low: \$7,500)

## Online Communications

- [E-Newsletter](#)
- [Grants Database](#)
- [RSS Feed](#)
- [Twitter](#)

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$723,481 to Foundation for Child Development, New York, NY, in 2012. For FCD Changing Faces of Americas Children - Young Scholars Program. Goals of Program are to stimulate both basic and policy-relevant research about early education, health and well-being of children living in immigrant families from birth to age ten, particularly those who are living in low-income families; and to support young investigators from the behavioral and social sciences or in an allied professional field who are untenured but in tenure-track positions or who have received tenure in the last four years from a college or university in the United States
- \$714,500 to New America Foundation, Washington, DC, in 2012. For Pre-K-3rd Education Reform Initiative and to support the inclusion of PreK data in the New America Foundations Federal Education Budget Project
- \$220,000 to Migration Policy Institute, Washington, DC, in 2012. For public symposium to highlight policy-relevant research generated from the first decade of the FCD Young Scholars Program, and invitational workshop on future research and field-building;
- \$200,000 to University of Minnesota, Minneapolis, MN, in 2012. For research and evaluation of Midwest expansion of Child-Parent (PreK-3rd) Center Education Program

- \$197,580 to Foundation for Child Development, New York, NY, in 2012. For the PreK-3rd Research and Evaluation Convening which will produce four papers and a technical manual on the design of PreK-3rd evaluations
- \$106,370 to Duke University, Durham, NC, in 2012. For continuing development, maintenance and promotion of FCD Child Well-Being Index (CWI)
- \$102,000 to University of Chicago, Chicago, IL, in 2012. To support two case studies of birth-to-college approach to public education as developed by the University's Urban Education Institute and Ounce of Prevention Fund
- \$61,168 to North Carolina Central University, Durham, NC, in 2012. For continuing development, maintenance and promotion of FCD Child Well-Being Index (CWI)
- \$57,786 to Rockefeller Archive Center, Sleepy Hollow, NY, in 2012. For the FCD Digitization Project
- \$30,000 to Migration Policy Institute, Washington, DC, in 2012. Toward support of Transatlantic Learning Community on Early Childhood Issues

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## Moriah Fund

**Last Updated:** 2014-02-04

### At A Glance

1 Farragut Sq. S. , 1634 I St. N.W., Ste. 1000  
 Washington, DC United States 20006-4015  
 Telephone: (202) 783-8488  
 Contact: Mary Ann Stein, Pres.  
 Fax: (202) 783-8499  
 E-mail: [info@moriahfund.org](mailto:info@moriahfund.org)  
 URL: [www.moriahfund.org](http://www.moriahfund.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

### Financial Data

(yr. ended 2012-12-31)  
 Assets: \$99,283,417  
 Total giving: \$11,570,650

### EIN

311129589

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

Israel office e-mail: [MoriahF@actcom.net.il](mailto:MoriahF@actcom.net.il); Requests in Israel: Don Futterman, 18 Weizman St., Kfar Saba, Israel 44247

### Background

Established in 1985 in IN.

The fund was established to perpetuate the lifelong philanthropic commitment of its founders, Robert and Clarence Efroymsen.

### Limitations

Giving nationally and internationally in the United States and Israel. Giving for the Economic Justice Program focuses on Washington, DC, MD and VA.

No support for lobbying or political campaigns, private foundations, or arts organizations.

No grants to individuals, or for medical research.

### Purpose and Activities

Promote human rights and democracy, help disadvantaged people gain self-sufficiency and control over their lives, and promote women's rights and reproductive health. The fund supports programs that strengthen local involvement, leadership and institutional development. The fund focuses on areas where private funding can make a difference, that is, areas that receive inadequate government funds, or that leverage public and private support through advocacy and the modeling of innovative programs.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

### **Economic Justice**

The fund will support policy, advocacy and community organizing groups in DC, Maryland and Virginia, and national organizations working to: improve policies and practices affecting the income, benefits and work conditions of low-wage workers.

### **Human Rights**

The fund has a strong commitment to human rights and funds a variety of human rights efforts throughout its program areas. In addition, the fund makes a small number of grants to support other human rights programs, most importantly the Fund for Global Human Rights, which is raising and directing funds to frontline in-country human rights groups worldwide.

### **Israel**

The program gives priority to grassroots and community-based organizations, advocacy activities, and the development of model programs that can affect national policies. The foundation places emphasis on organizations that promote: 1) civil rights; 2) social justice and democracy; and 3) improve educational and economic opportunities for the disadvantaged. The program no longer provides support for coexistence, environment, and religious pluralism programs.

### **Women's Rights and Reproductive Health Program**

The fund supports efforts to transform the legal, political, economic and cultural structures that sustain gender discrimination and violence and that limit women's full participation in society. Specifically, the fund has two priorities: 1) women's reproductive health and rights; and 2) women's human rights, with an emphasis on the rights of immigrant and refugee women.

## **Fields of Interest**

### **Subjects**

- Civil/human rights
- Community/economic development
- Family services, single parents
- International human rights
- Leadership development
- Reproductive health
- Reproductive health, family planning

### **International Interests**

- Israel

### **Geographic Focus**

- National, International
- District of Columbia
- Maryland
- Virginia

### **Types of Support**

- Conferences/seminars
- Continuing support
- Emergency funds
- Endowments
- General/operating support
- Income development
- In-kind gifts
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Program-related investments/loans
- Seed money
- Technical assistance

### **Publications**

- Application guidelines
- Financial statement
- Grants list
- Program policy statement

### **Application Information**

The Moriah Fund will no longer accept or review unsolicited proposals. This new policy, a result of the current economic situation and decline in Moriah's assets, is intended to save organizations the work of preparing proposals that cannot be



funded. As Moriah determines new strategies, policies and plans, the foundation will keep you updated on the web site. In the meantime, grantmaking will continue on an invitation-only basis. See web site for specific policies regarding the proposal process after a letter of inquiry is reviewed.

Application form not required.

Initial approach: Letter of inquiry. Proposals only by invitation.

Board meeting date(s): May and Nov.

Deadline(s): Mar. 1 and Sept. 1

## **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Clarence W. Efroymsen‡
- Robert A. Efroymsen‡
- Ben-Ephraim Gershon Fund
- Gustave Aaron Efroymsen Fund

## **Officers, Program Board and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Mary Ann Stein \*, Pres. and Prog. Board
- Barbara Schirfer, C.F.O.
- Craig Cramer, Prog. Board
- Debra Delee, Prog. Board
- Jane Fox Johnson, Prog. Board
- Kim Jones, Prog. Board
- Judith Lichtman \*, Prog. Board
- Norman Rosenberg, Prog. Board
- Gideon Stein \*, Prog. Board
- Noah Stein, Prog. Board
- Dorothy Swamy, Prog. Board

## **Staff**

### **Number of Staff**

8 full-time professional

2 part-time professional

5 full-time support

### **Key Staff**

*Note: Does not include officers.*

- Rubie G. Coles, Assoc. Dir./Prog. Dir., Economic Justice
- Don Futterman, Prog. Dir., Israel
- Katherine Jagow, Admin. Off.
- Batya Kallus, Prog. Off., Israel
- Shira Saperstain, Deputy Dir./Prog. Dir., Women's Rights and Reproductive Health
- Gwen Tran, Office Mgr.

## **Memberships**

### **Affinity Groups**

- Association of Black Foundation Executives
- Black Philanthropic Alliance
- Funders Concerned About AIDS
- Funders Network on Population, Reproductive Health and Rights
- Funders Network on Transforming the Global Economy
- Grantmakers for Children, Youth and Families
- Grantmakers Income Security Taskforce
- Inter-Agency Task Force on Israeli Arab Issues
- International Human Rights Funders Group
- Jewish Funders Network
- Neighborhood Funders Group

## **Financial Data**

Year ended 2012-12-31

Assets: \$99,283,417 (market value)

Expenditures: \$13,207,071

Total giving: \$11,570,650

Qualifying distributions: \$12,996,138

Giving activities include:

\$11,570,650 for 205 grants (high: \$1,419,000; low: \$500)

\$100,000 for 1 loan/program-related investment

## Online Communications

- [Grants List](#)

## Additional Location Information

County: District of Columbia

Metropolitan area: Washington-Arlington-Alexandria, DC-VA-MD-WV

Congressional district: District of Columbia District At-large

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$1,419,000 to New Israel Fund, Washington, DC, in 2012. For the operations, grants and programs
- \$650,000 to Fund for Global Human Rights, Washington, DC, in 2012. For the Centro Mujeres
- \$200,000 to Future Is Now Schools, Los Angeles, CA, in 2012. For general support
- \$100,000 to National Network of Abortion Funds, Boston, MA, in 2012. For general support
- \$100,000 to Center on Budget and Policy Priorities, Washington, DC, in 2012. For public education among key stakeholders on fiscal issues, provide analysis of education fiscal policies
- \$50,000 to New America Foundation, Washington, DC, in 2012. For its Open Zion project
- \$40,000 to National Family Planning and Reproductive Health Association, Washington, DC, in 2012. For general support
- \$30,000 to Jews United for Justice, Washington, DC, in 2012. For general support
- \$30,000 to Urgent Action Fund for Womens Human Rights, San Francisco, CA, in 2012. For general support
- \$20,000 to Dc Special Education Co-Operative, Washington, DC, in 2012. For general support

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## The PNC Foundation

**Last Updated:** 2014-08-15

### At A Glance

(formerly PNC Bank Foundation)

1 PNC Plz. , 249 5th Ave., 20th Fl.

Pittsburgh, PA United States 15222-1119

Telephone: (412) 762-2748

Contact: Eva Tansky Blum, Chair. and Pres.

Fax: (412) 705-3584

E-mail: [eva.blum@pnc.com](mailto:eva.blum@pnc.com)

URL: [www.pncsites.com/pncfoundation/foundation\\_ove...](http://www.pncsites.com/pncfoundation/foundation_ove...)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2013-12-31)

Assets: \$99,267,621

Total giving: \$48,269,009

### EIN

251202255

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

Additional contact: Michael Labriola, Secy., tel.: (412) 762-2803, e-mail: [michael.labriola@pnc.com](mailto:michael.labriola@pnc.com); contact for PNC Grow Up Great: Sally McCrady, Prog. Mgr., tel.: (412) 768-8371, e-mail: [sally.mccrady@pnc.com](mailto:sally.mccrady@pnc.com)

### Background

Established in 1970 in PA.

### Limitations

Giving primarily in areas of company operations in Washington, DC, DE, FL, IL, IN, KY, MD, MI, MO, NJ, OH, TN, VA, and WI, with emphasis on PA.

No support for discriminatory organizations, churches, religious organizations, advocacy groups, or private foundations.

No grants to individuals, or for endowments, conferences, seminars, tickets, or goodwill advertising, or annual campaigns for hospitals, colleges, or universities; no loans (except for program-related investments)

## **Purpose and Activities**

The foundation supports programs designed to enhance educational opportunities for children, with emphasis on underserved pre-K children; and to promote the growth of targeted communities through economic development initiatives.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Affordable Housing**

The foundation supports programs designed to promote affordable housing for low-and moderate-income individuals; provide counseling and services to help individuals maintain housing stock; offer transitional housing units and initiatives; and provide credit counseling assistance to individuals to help them prepare for homeownership.

### **Arts and Culture**

The foundation supports cultural enrichment programs designed to benefit the community.

### **Community Development**

The foundation supports programs designed to provide technical assistance to, or loans for, small businesses located in low-and moderate-income areas; and supports small businesses that employ low-and moderate-income individuals.

### **Community Services**

The foundation supports programs designed to provide social services; job training; essential services; early learning and educational enrichment; and construction of community facilities for low-and moderate-income individuals and families.

### **Economic Development**

The foundation supports programs designed to enhance quality of life through neighborhood revitalization, cultural enrichment, and human services. Special emphasis is directed toward programs designed to promote growth of targeted low-and moderate-income communities and/or provide services to those communities.

### **Education**

The foundation supports educational programs for children and youth, teachers, and families, with emphasis on early education initiatives for low-and moderate-income children. Special emphasis is directed toward programs designed to promote math, science, the arts, or financial education; provide direct services for children in their classroom or community; foster professional development for teachers; promote family engagement in the early education of children being served by grants; and include volunteer opportunities for PNC employees.

### **Matching Gift Program**

The foundation matches contributions made by employees of PNC Financial Services Group and its subsidiaries to educational institutions and human service organizations on a one-for-one basis from \$50 to \$2,500 per employee, per year.

### **PNC Grow Up Great**

Through the PNC Grow Up Great 10-year initiative, the foundation supports programs designed to improve school readiness of children from birth to age five through grants to nonprofit organizations and early education centers involved with math, science, the arts, and financial education for young children. Visit URL <http://www.pncgrowupgreat.com/> for more information.

### **Revitalization and Stabilization of Low-and Moderate-Income Areas**

The foundation supports programs designed to improve living and working conditions of low-and moderate-income communities; eliminate blight; and attract and retain businesses and residents to the community.

## **Fields of Interest**

### **Subjects**

- Arts
- Arts education
- Business/industry
- Child development, education
- Community development, neighborhood development
- Community development, small businesses
- Community/economic development
- Economic development
- Education, early childhood education
- Elementary/secondary education
- Employment, training
- Environment
- Housing/shelter

- Housing/shelter, home owners
- Housing/shelter, temporary shelter
- Human services
- Human services, financial counseling
- Mathematics
- Science
- Teacher school/education

#### **Population Groups**

- Children
- Economically disadvantaged

#### **Geographic Focus**

- District of Columbia
- Delaware
- Florida
- Illinois
- Indiana
- Kentucky
- Maryland
- Michigan
- Missouri
- New Jersey
- Ohio
- Pennsylvania
- Tennessee
- Virginia
- Wisconsin

#### **Types of Support**

- Building/renovation
- Capital campaigns
- Continuing support
- Curriculum development
- Employee matching gifts
- General/operating support
- Matching/challenge support
- Program development
- Program-related investments/loans
- Publication

#### **Publications**

- Application guidelines
- Corporate report

#### **Application Information**

An interview may be requested. Organizations that receive support are asked to submit a grant report.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Qualifications of key personnel
4. Statement of problem project will address
5. Population served
6. Name, address and phone number of organization
7. Copy of IRS Determination Letter
8. Brief history of organization and description of its mission
9. Copy of most recent annual report/audited financial statement/990
10. How project's results will be evaluated or measured
11. Descriptive literature about organization
12. Listing of board of directors, trustees, officers and other key people and their affiliations
13. Detailed description of project and amount of funding requested
14. Copy of current year's organizational budget and/or project budget
15. Listing of additional sources and amount of support
16. Additional materials/documentation

Initial approach: Complete online application

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: Approximately 6 weeks

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- PNC Bank, N.A.
- The PNC Financial Services Group, Inc.
- PNC Equity Partners, LP

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Eva T. Blum \*, Chair. and Pres.  
Affiliation(s):  
*The PNC Financial Services Group, Inc., Exec. V.P. and Dir., Community Affairs*
- Michael A. Labriola \*, Secy.
- Thomas F. Garbe, Treas.
- Peter K. Classen
- William S. Demchak  
Affiliation(s):  
*PNC Financial Services Group, Pres. and C.E.O.*
- Joan L. Gulley  
Affiliation(s):  
*The PNC Financial Services Group, Inc., Chief Human Resources Off.*
- Joseph C. Guyaux  
Affiliation(s):  
*The PNC Financial Services Group, Inc., Sr. Vice-Chair.*
- Neil Hall  
Affiliation(s):  
*The PNC Financial Services Group, Inc., Exec. V.P., Retail Banking*
- Roberta London
- Donna C. Peterman  
Affiliation(s):  
*The PNC Financial Services Group, Inc., C.C.O.*
- Shelley J. Seifert  
Affiliation(s):  
*The PNC Financial Services Group, Inc., Exec. V.P., Enterprise Services*
- PNC Bank, N.A.

## Staff

### Key Staff

*Note: Does not include officers.*

- Sally McCrady, Prog. Mgr., PNC Grow Up Great

## Memberships

### Regional Associations of Grantmakers

- Council of New Jersey Grantmakers
- Grantmakers of Western Pennsylvania
- Philanthropy Network Greater Philadelphia
- Philanthropy Ohio

## Financial Data

Year ended 2013-12-31

Assets: \$99,267,621 (market value)

Gifts received: \$90,002,532

Expenditures: \$51,734,922

Total giving: \$48,269,009

Qualifying distributions: \$52,923,896

Giving activities include:

\$45,330,260 for grants

\$1,377,970 for 3889 employee matching gifts

\$870,359 for 3 loans/program-related investments

## Online Communications

- [PNC Grow Up Great on Facebook](#)
- [PNC Grow Up Great on Twitter](#)
- [YouTube](#)

## Additional Location Information

County: Allegheny

Metropolitan area: Pittsburgh, PA

Congressional district: Pennsylvania District 14

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$600,000 to Carnegie Mellon University, Pittsburgh, PA, in 2012. To support of the current PNC Chair of Computational Finance and the construction of the new building for the Tepper School of Business
- \$600,000 to United Way of Greater Cleveland, Cleveland, OH, in 2012. For Annual contribution to United Way of Cleveland to support social services, health, education and other community services
- \$500,000 to ACHIEVA, Pittsburgh, PA, in 2012. For support of People with Disabilities: ACHIEVA'S Commitment to the Community Capital Campaign The campaign will reduce the size and duration of waiting lists for vital services, increase participation in the ACHIEVA Family
- \$300,000 to Local Initiatives Support Corporation Greater Newark and Jersey City, Newark, NJ, in 2012. For Excellence (CORE) Phase II Program. CORE's objective is to deliver visible improvements coupled with increased local capacity on commercial corridors in low and moderate income census tracts
- \$270,000 to Wolf Trap Foundation for the Performing Arts, Vienna, VA, in 2012. For Wolf Trap National Park for the Performing Arts' Summer Season, which will be enjoyed by approximately 500,000 patrons
- \$245,166 to Adler Planetarium, Chicago, IL, in 2012. For a collaboration project with the Shedd Aquarium, Museum of Science and Industry, the Field Museum and the Chicago Public Schools to transform early science education for preschoolers in Chicago
- \$20,000 to Ideastream, Cleveland, OH, in 2012. For educational outreach programming at the Fairfax Center targeted to the at-risk children and families in the area
- \$11,500 to Oakland University, Rochester, MI, in 2012. For English As a Second Language program for the Hispanic youth population in Pontiac, serving 30 to 40 children from homes where English is not the primary language
- \$7,500 to Newark Emergency Services for Families, Newark, NJ, in 2012. For Families, Inc., (NESF) mission is to stabilize Newark families and individuals in crisis as well as to empower and prepare them to achieve self-sufficiency It administers programs such as emergency services, homeless service
- \$5,000 to Pittsburgh Foundation, Pittsburgh, PA, in 2012. For the Live Like Lou organization that fights Amylo Lateral Sclerosis otherwise known as Lou Gehrig's Disease

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## The Jacob and Valeria Langeloth Foundation

Last Updated: 2014-07-08

### At A Glance

275 Madison Ave., 33rd Fl.

New York, NY United States 10016-1101

Telephone: (212) 687-1133

Contact: Andrea Fionda, Prog. Off.

Fax: (212) 687-8877

E-mail: [afionda@langeloth.org](mailto:afionda@langeloth.org)

URL: [www.langeloth.org](http://www.langeloth.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2013-11-30)

Assets: \$97,333,332

Total giving: \$4,458,279

### EIN

## Background

Incorporated in 1915 in NY as the Valeria Home; renamed in 1975.

## Limitations

Giving primarily in NY and for projects that hold promise of national impact or extensive replication.

No support for preventive medicine, or for children or end-of-life issues.

No grants to individuals, or for annual campaigns, capital campaigns, building or renovation projects, or budgetary relief.

## Purpose and Activities

The foundation's grantmaking program is centered on the concepts of health and well-being. The foundation's purpose is to promote and support effective and creative programs, practices and policies related to healing from illness, accident, physical, social or emotional trauma and to extend the availability of programs that promote healing to underserved populations, with a focus on justice-involved people. The foundation believes that justice-involved people experience disproportionately higher rates of infectious and chronic diseases, substance abuse, mental illness, and trauma than the general population. As such, jails and prisons represent one of the largest target populations for public health services in America, and are important sites for improving the overall health and well-being of communities. The foundation is interested in projects that seek to improve the physical and mental health of individuals involved in the criminal justice system. Programs focusing on alternatives to incarceration, detention, and reentry will be considered. While the foundation does not support prevention projects, it is interested in programs that seek to reduce recidivism.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Health and Well-Being for the Underserved

In an effort to advance areas the Foundation's Board considers to be significant in the health care field, the Foundation has established Funding Priorities. The foundation's current funding priority is Correctional Health Care. Other projects falling within the foundation's stated guidelines will also be considered for funding. The foundation is particularly interested in funding programs that address the health of individuals who, because of barriers to accessing care, experience poor and sub-optimal health, including: 1) Those with no or severely limited income; 2) Cultural differences; 3) Lack of English language skills; 4) Lack of health insurance or inadequate health insurance; 5) Limited access to health care services; 6) Mental illness, or substance abuse, homelessness, incarceration, and exposure to trauma.

## Fields of Interest

### Subjects

- Health care

### Population Groups

- Adults
- African Americans/Blacks
- Economically disadvantaged
- Hispanics/Latinos
- Homeless
- Immigrants/refugees
- LGBTQ
- Mentally disabled
- Minorities
- Native Americans/American Indians
- Offenders/ex-offenders
- Substance abusers

## Geographic Focus

- New York

## Types of Support

- Matching/challenge support
- Program development
- Program evaluation

## Publications

- Grants list

## Application Information

Potential applicants must register project ideas on foundation's web site. Letters of intent and proposals are accepted by invitation only following online project registration. Unsolicited letters of intent or proposals not accepted. Registrations only accepted via foundation's online registration system.

Application form required.

Initial approach: Online registration for letter of intent

Copies of proposal: 5

Board meeting date(s): Apr. and Oct.

Deadline(s): See foundation web site for current deadline

Final notification: Varies

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Jacob Langeloth‡

## Officer

- Scott Moyer, Pres.

## Staff

### Number of Staff

3 full-time professional

### Key Staff

*Note: Does not include officers.*

- Andrea Fionda, Prog. Off.
- Melissa Houston, Grants Admin.

## Memberships

### Affinity Groups

- Grantmakers In Health

## Financial Data

Year ended 2013-11-30

Assets: \$97,333,332 (market value)

Expenditures: \$5,806,700

Total giving: \$4,458,279

Qualifying distributions: \$4,971,789

Giving activities include:

\$4,458,279 for 52 grants (high: \$400,000; low: \$2,500)

## Online Communications

- [Facebook](#)
- [Twitter](#)

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$496,788 to Vera Institute of Justice, New York, NY, in 2010. For Common Justice demonstration project
- \$400,040 to San Francisco Public Health Foundation, San Francisco, CA, in 2010. For Transitions Clinic Network
- \$368,891 to Legal Aid Society, New York, NY, in 2010. For Manhattan Arraignment Diversion Project
- \$364,854 to University of California, San Francisco, CA, in 2010. To pilot multidisciplinary geriatrics program to assess and improve care of older jail inmates
- \$308,803 to Corporation for Supportive Housing, New York, NY, in 2010. To end homelessness for veterans with complex health needs
- \$250,617 to Physicians for Human Rights, New York, NY, in 2010. For Immigration Detainee Health Project
- \$200,000 to Fortune Society, Long Island City, NY, in 2010. For mental health services pilot enhancement program



- \$136,175 to Center for Alternative Sentencing and Employment Services, New York, NY, in 2010. For Transitional Case Management (TCM) program
  - \$100,000 to National Public Radio, Washington, DC, in 2010. For Impact of War Project
  - \$99,609 to Council of State Governments, Lexington, KY, in 2010. For efforts in NYC to improve response to people with mental illness involved in the criminal justice system
- 

## Capitol Federal Foundation

**Last Updated:** 2014-07-22

### At A Glance

700 S. Kansas Ave., Ste. 517  
Topeka, KS United States 66603-3809  
Telephone: (785) 270-6041  
Contact: Tammy Dishman, Pres. and Exec. Dir.  
URL: [www.capfed.com/site/en/home/community.html](http://www.capfed.com/site/en/home/community.html)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$94,589,305  
Total giving: \$3,162,245

### EIN

481214952

### 990

[2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

Additional tel.: (785) 270-6040

### Background

Established in 1999 in KS.

### Limitations

Giving limited to areas of company operations in central and northeastern KS.  
No support for religious or political organizations.

### Purpose and Activities

The foundation supports performing art centers and organizations involved with education, health, affordable housing, human services, and community development.

### Fields of Interest

#### Subjects

- Big Brothers/Big Sisters
- Boys & girls clubs
- Community/economic development
- Education
- Foundations (community)
- Health care
- Higher education
- Housing/shelter
- Human services
- Performing arts centers
- United Ways and Federated Giving Programs
- Youth, services

### Geographic Focus

- Kansas

### Types of Support

- Annual campaigns
- Building/renovation
- Capital campaigns
- Conferences/seminars
- Continuing support
- Emergency funds
- Employee matching gifts
- Employee volunteer services
- Equipment
- Fellowships
- General/operating support
- Income development
- Internship funds
- Management development/capacity building
- Matching/challenge support
- Professorships
- Program development
- Scholarship funds
- Seed money
- Technical assistance

## Application Information

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Listing of board of directors, trustees, officers and other key people and their affiliations
3. Copy of current year's organizational budget and/or project budget
4. Listing of additional sources and amount of support

Initial approach: Letter or telephone

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: 90 to 120 days

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Capitol Federal Financial

## Officers

- John C. Dicus, Chair.  
Affiliation(s):  
*Capitol Federal Financial, Inc., Chair., Pres., and C.E.O.*
- Tammy Dishman, Pres. and Exec. Dir.
- John B. Dicus, Secy.-Treas.  
Affiliation(s):  
*Capitol Federal Financial, Chair., Pres., and C.E.O.*

## Financial Data

Year ended 2012-12-31

Assets: \$94,589,305 (market value)

Expenditures: \$3,689,163

Total giving: \$3,162,245

Qualifying distributions: \$3,277,708

Giving activities include:

\$3,162,245 for 394 grants (high: \$300,000; low: \$37)

## Additional Location Information

County: Shawnee

Metropolitan area: Topeka, KS

Congressional district: Kansas District 02

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$100,000 to Kansas University Endowment Association, Lawrence, KS, in 2012.
  - \$77,480 to Kansas University Endowment Association, Lawrence, KS, in 2012.
  - \$77,480 to Kansas University Endowment Association, Lawrence, KS, in 2012.
  - \$45,000 to Wichita State University Foundation, Wichita, KS, in 2012.
  - \$39,500 to Emporia State University Foundation, Emporia, KS, in 2012.
  - \$25,000 to Kansas University Endowment Association, Lawrence, KS, in 2012.
  - \$25,000 to Flint Hills Technical College Foundation, Emporia, KS, in 2012.
  - \$20,000 to Washburn University Foundation, Topeka, KS, in 2012.
  - \$10,000 to Shawnee Mission Education Foundation, Shawnee Mission, KS, in 2012.
- 

## Robert Sterling Clark Foundation, Inc.

**Last Updated:** 2014-07-16

### At A Glance

135 E. 64th St.  
New York, NY United States 10065-7045  
Telephone: (212) 288-8900  
Contact: Laura Wolff, Acting Dir.  
Fax: (212) 288-1033  
E-mail: [rscf@rsclark.org](mailto:rscf@rsclark.org)  
URL: [www.rsclark.org](http://www.rsclark.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-10-31)  
Assets: \$91,733,173  
Total giving: \$4,149,571

### EIN

131957792

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2000](#)

### Background

Incorporated in 1952 in NY.

When Robert Sterling Clark died in 1956, he left one-quarter of his estate to the foundation and one-quarter to the Sterling and Francine Clark Art Institute in Williamstown, Massachusetts. The other half of his estate was left in trust to his wife, Francine. When Mrs. Clark died in 1960, the institution and the foundation shared her portion of the estate. After taxes, the total estate was valued at more than \$50 million. The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

### Limitations

Giving primarily in New York State for the Public Institutions Program; nationally for reproductive rights; and nationally for organizations working in Africa, Latin America, and the Middle East to promote international arts and cultural engagement.

No support for religious organizations.

No grants to individuals, or for annual campaigns, seed money, emergency funds, deficit financing, capital or endowment funds, general support or scholarships.

### Purpose and Activities

The foundation supports projects that: 1) promote international cultural engagement; 2) ensure the effectiveness and accountability of public agencies in New York City and State; and 3) protect access to comprehensive reproductive health through litigation and public policy advocacy in New York State and at the federal level.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

## **Employee Matching Gifts**

The foundation matches the monetary gifts of its staff to charitable organizations.

## **Ensuring Access to Comprehensive Reproductive Health Information and Services**

The objective of the foundation's work in this field is to protect and expand women's access to reproductive health services. The strategies employed by foundation grantees to achieve these objectives include policy analysis, advocacy, public education and litigation aimed at: 1) Promoting the implementation of laws, policies, and practices that facilitate access to contraception and abortion; 2) Challenging laws and legal decisions that undermine reproductive rights, and developing legal arguments in support of these rights; 3) Promoting comprehensive sexuality education; and 4) Preventing harassment and violence against reproductive health care providers and patients.

## **Improving the Performance of Public Institutions in New York**

The foundation's goals in this area include: 1) safeguarding the well-being of low-income families and other vulnerable New Yorkers who are most dependent on publicly funded agencies; 2) ensuring that all children in the State receive high quality care and education from birth onward, and that young people and adults receive the training, employment services, and other supports necessary to become productive workers and community members; 3) improving government policies and operations that shape the physical environment in New York State, including housing, economic and community development, environmental protection, and solid waste management programs. In all of these areas, our grants support: 1. Research to determine the efficacy of government programs; 2. Education, advocacy, and organizing to inform public policy discussions and assist government officials in developing and implementing sound policies and programs; and 3. Litigation when other actions fail to improve government performance.

## **Promoting International Arts Engagement**

The objective of the program is to help promote global understanding through the arts. The foundation supports initiatives of U.S. visual and performing arts organizations that engage communities beyond the artistic work. Currently, the focus of this program is Africa, Latin America, and the Middle East. While support for projects that bring international artists to the U.S. is considered, the Foundation gives preference to projects that send artists and representatives of U.S. arts organizations abroad. The foundation's strategies to promote international arts engagement include encouraging and supporting public-private partnerships, corporate sector partnerships, and partnerships with foreign entities. The foundation also supports U.S. arts organizations that build transformative bilateral relationships with international partners, and develop internet technology that advances global arts engagement.

## **Fields of Interest**

### **Subjects**

- Arts
- Civil liberties, reproductive rights
- Community/economic development
- Environment
- Family services
- Government/public administration
- Human services
- Museums
- Performing arts
- Performing arts, dance
- Performing arts, music
- Performing arts, theater
- Public affairs
- Public policy, research
- Reproductive health, family planning
- Urban/community development
- Visual arts

### **International Interests**

- Africa
- Global Programs
- Latin America
- Middle East

### **Population Groups**

- Adults, women
- Aging
- Children/youth
- Economically disadvantaged
- Homeless
- Women
- Young adults
- Youth

## Geographic Focus

- New York

## Types of Support

- Continuing support
- Employee matching gifts
- Exchange programs
- Program development
- Publication
- Research

## Publications

- Application guidelines
- Annual report (including application guidelines)
- Grants list
- Occasional report
- Program policy statement

## Application Information

Application form not required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Results expected from proposed grant
3. Qualifications of key personnel
4. Copy of IRS Determination Letter
5. Copy of most recent annual report/audited financial statement/990
6. How project's results will be evaluated or measured
7. Listing of board of directors, trustees, officers and other key people and their affiliations
8. Detailed description of project and amount of funding requested
9. Copy of current year's organizational budget and/or project budget
10. Listing of additional sources and amount of support
11. Additional materials/documentation

Initial approach: Proposal (not exceeding 15 pages) and a one-page proposal summary

Copies of proposal: 1

Board meeting date(s): Jan., Apr., July, and Oct.

Deadline(s): None

Final notification: 1 to 6 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Robert Sterling Clark‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- James Allen Smith \*, Chair.
- Joanna D. Underwood, Secy.
- Clara Miller \*, Treas.
- Laura Wolff, Acting Exec. Dir.
- Paul R. Dolan
- Philip Li
- Julie Muraco
- John Hoyt Stookey

## Staff

### Number of Staff

2 full-time professional

1 full-time support

### Key Staff

*Note: Does not include officers.*

- Roslyn Black, Prog. Off.

- Alicia Sylvia, Off. Mgr.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy New York

### Affinity Groups

- Funders Network on Population, Reproductive Health and Rights
- Grantmakers for Children, Youth and Families
- Grantmakers In the Arts

### Associations and Other Philanthropic Organizations

- Nonprofit Coordinating Committee of New York

## Financial Data

Year ended 2012-10-31

Assets: \$91,733,173 (market value)

Expenditures: \$5,755,574

Total giving: \$4,149,571

Qualifying distributions: \$5,073,793

Giving activities include:

\$4,141,485 for 77 grants

\$8,086 for 21 employee matching gifts

Estimated financial data for year ending 2012-10-31:

Assets: \$92,000,000

Grants: \$4,500,000

## Online Communications

- [Grants Database](#)
- [Robert Sterling Clark Foundation's Philanthropy Promise](#)
- [Knowledge Center](#)

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$215,000 to Joyce Theater, New York, NY, in 2012. For Cuban dance exchange-training, commission, presentations
- \$200,000 to National Performance Network, New Orleans, LA, in 2012. For Performing Americas Program - touring residencies, center travel and creative exchanges
- \$200,000 to Mapp International Productions, New York, NY, in 2012. For Africa Contemporary Arts Consortium
- \$200,000 to Mid Atlantic Arts Foundation, Baltimore, MD, in 2013. For Southern Exposure: Performing Arts of Latin America tour
- \$200,000 to Brooklyn Academy of Music, Brooklyn, NY, in 2013. For Global BAM Dance Motion USA IV, Dance Africa Festivals and music from Muslim Africa
- \$150,000 to Center for Reproductive Rights, New York, NY, in 2013. For litigation and developing new legal arguments, challenging abortion restrictions, and to engage medical and legal scholars in supporting these challenges
- \$150,000 to Planned Parenthood Federation of America, New York, NY, in 2013. For Public Policy Litigation and Law department to fight laws that limit access to reproductive services
- \$150,000 to Planned Parenthood Federation of America, New York, NY, in 2012. For reproductive rights litigation
- \$140,000 to Center for Reproductive Rights, New York, NY, in 2012. For litigation, legal analysis, research and public education to counter abortion restitutions and safeguard reproductive rights and healthcare
- \$130,000 to CEC ArtsLink, New York, NY, in 2012.
- \$100,000 to American Civil Liberties Union, New York, NY, in 2012. For litigation, policy analysis, public education and advocacy to protect access to abortion and contraception
- \$100,000 to New York Foundation for the Arts, Brooklyn, NY, in 2013. For Emergency Relief Fund for Hurricane Sandy
- \$100,000 to Art 21, New York, NY, in 2012. For engagement with international audiences
- \$100,000 to Art 21, New York, NY, in 2012. For engagement with international audiences
- \$100,000 to National Womens Law Center, Washington, DC, in 2013. For work in New York on Reproductive Rights and Health Program
- \$90,000 to National Family Planning and Reproductive Health Association, Washington, DC, in 2013. For advocacy and technical assistance to its members

- \$80,000 to National Center for Law and Economic Justice, New York, NY, in 2012. For litigation, monitoring implementation of court orders, and advising government officials to ensure that low income New Yorkers receive public benefits to which they are entitled
- \$75,000 to Fund for the City of New York, New York, NY, in 2013. For re-granting in support of research, advocacy, public education, and assistance to New York City and New York State officials aimed at improving the quality and availability of early childhood education
- \$70,000 to Teachers College Columbia University, New York, NY, in 2013. For research, public education, and advocacy regarding New York state policy reforms needed to ensure that all children receive constitutionally mandated sound basic education
- \$70,000 to Community Catalyst, Boston, MA, in 2012. To help community activists preserve reproductive health services when secular hospitals become part of religious health systems, to produce public education materials about consequences of religious restrictions and hospital mergers, and to promote administrative and policy strategies to protect access to reproductive health care
- \$70,000 to Community Catalyst, Boston, MA, in 2012. To help community activists preserve reproductive health services when secular hospitals become part of religious health systems, to produce public educational materials about consequences of religious restrictions and hospital mergers, and to promote administrative and policy strategies to protect access to reproductive health care
- \$60,000 to Sexuality Information and Education Council of the U.S., New York, NY, in 2013. For public policy work for comprehensive sex education
- \$55,000 to New York Public Interest Research Group Fund, New York, NY, in 2012. To educate NYC and NYS policymakers and the public about new waste-to-energy technologies and environmentally preferable alternatives, and to advise them about city contract proposals and appropriate state regulation
- \$55,000 to Advocates for Children of New York, New York, NY, in 2012. For research, advocacy, organizing, and assistance to New York State officials aimed at informing revision of High School graduation requirements and establishing multiple pathways to diploma
- \$50,000 to Natural Resources Defense Council, New York, NY, in 2012. For New York Solid Waste Initiative including advocacy and assistance to New York City officials, and public education regarding implementation of expanded recycling initiative
- \$50,000 to Supportive Housing Network of New York, New York, NY, in 2012. For research, policy analysis, and assistance to state policymakers in developing and implementing new supportive housing initiatives for high-cost Medicaid clients

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## Freddie Mac Foundation

**Last Updated:** 2013-11-13

### At A Glance

8250 Jones Branch Dr., M.S. A-40  
 McLean, VA United States 22102-3110  
 Telephone: (703) 918-8888  
 Fax: (703) 918-8895  
 E-mail: [freddiemac\\_foundation@freddiemac.com](mailto:freddiemac_foundation@freddiemac.com)  
 URL: [www.freddiemacfoundation.org](http://www.freddiemacfoundation.org)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)  
 Assets: \$90,573,437  
 Total giving: \$22,132,385

### EIN

541573760

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Established in 1991 in VA.

### Limitations

Giving primarily in the metropolitan Washington, DC, area, with emphasis on the District of Columbia, Charles, Frederick, Howard, Montgomery, and Prince George's counties, MD, and Alexandria, Arlington County, Fairfax County, Falls Church, Leesburg, Loudoun County, Manassas Park, and Prince William County, VA; giving also to statewide organizations in MD and

VA and national organizations.

No support for discriminatory organizations.

No grants to individuals, or for training in or promotion of religious doctrine, debt reduction, endowments, or lobbying or political activity.

## **Purpose and Activities**

The foundation supports programs designed to make home a place where vulnerable children and their families can thrive. Special emphasis is directed toward programs designed to create stable homes and families; find adoptive homes for foster children; and help youth improve their academic achievement and achieve career success.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Academic and Career Success**

The foundation supports programs designed to help vulnerable young people in low-income communities achieve academically and succeed in their careers. Special emphasis is directed toward childhood education; academic achievement for school-age children; and college preparation and career training with the goal of preparing young people to become self-sufficient.

### **Employee Matching Gifts Program**

The foundation matches contributions made by employees and directors of Freddie Mac to nonprofit organizations on a one-for-one basis from \$25 to \$10,000 per contributor, per year.

### **Foster Care and Adoption**

The foundation supports programs designed to improve the lives of foster children by promoting adoption from foster care; providing pre-and post-adoption resources; and helping teens transition out of the foster care system.

### **J.C. Nalle Community School**

The foundation, in partnership with J. C. Elementary School, supports programs and activities for students living in Southeast Washington, DC. The foundation awards grants and volunteer hours from Freddie Mac employees to bring an array of support services to the children and families of J.C. Nalle, to transform the school into a full service community school.

### **Stable Homes, Stable Families**

The foundation supports programs designed to help families in crises secure vital services to meet their immediate needs, including emergency shelter and transitional housing; and programs designed to address long-term needs by supporting residential services so that families become more self-sufficient. Special emphasis is directed toward families who are homeless and those who are participating in housing-based service programs.

### **Wednesday's Child**

Through the Wednesday's Child program, the foundation increases the number of children being adopted across the country. The foundation partners with local news stations and child welfare organizations for televised news segments that profile children waiting to be adopted. The news program highlights each child's special qualities and interests, and each child is also featured on the National Adoption Center's Web site.

## **Fields of Interest**

### **Subjects**

- Children, adoption
- Children, foster care
- Children/youth, services
- Education
- Education, early childhood education
- Education, services
- Elementary school/education
- Employment, training
- Family services
- Housing/shelter
- Housing/shelter, homeless
- Housing/shelter, temporary shelter
- Secondary school/education
- Youth development

### **Population Groups**

- Economically disadvantaged
- Homeless

### **Geographic Focus**

- District of Columbia
- Maryland



- Virginia

## Types of Support

- Capital campaigns
- Conferences/seminars
- Consulting services
- Continuing support
- Employee matching gifts
- Employee volunteer services
- General/operating support
- Management development/capacity building
- Program development
- Publication
- Research
- Sponsorships
- Technical assistance

## Publications

- Annual report
- Grants list
- Informational brochure

## Application Information

The foundation is winding down its giving and plans to conclude its grantmaking in 2014. Grant applications are accepted from current grantees only. Unsolicited applications to support new programs or projects are not accepted.

Application form not required.

Board meeting date(s): 1st Thurs. in Mar., June, Sept., and Dec.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Federal Home Loan Mortgage Corp.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Ronald F. Poe \*, Chair.  
Affiliation(s):  
*Ronald F. Poe & Assocs., Pres.*
- Ralph F. Boyd, Jr., C.E.O. and Pres.  
Affiliation(s):  
*Federal Home Loan Mortgage Corp., Exec. V.P., Comm. Rels.*
- Margaret Meiers, V.P. and Prog. Dir.
- Alicia Myara, Secy.  
Affiliation(s):  
*Federal Home Loan Mortgage Corp., V.P., Corp. Governance*
- Adel Antoun, Treas and C.F.O.
- Wendell J. Chambliss, Exec. Dir.
- Carolyn Byrd  
Affiliation(s):  
*GlobalTech Financial, LLC, Chair. and C.E.O.*
- Paul E. Mullings  
Affiliation(s):  
*Federal Home Loan Mortgage Corp., Sr. V.P., Single-Family Sourcing*
- Nicolas Retsinas  
Affiliation(s):  
*Harvard University, Dir., Joint Center for Housing Studies*
- Dwight Robinson  
Affiliation(s):  
*Freddie Mac, Sr. V.P. and Chief Diversity Officer, Outreach, Diversity, and Inclusion Div.*
- Clarice Dibble Walker  
Affiliation(s):  
*Howard University, Assoc. Professor Emerita*

## Staff

### Number of Staff

11 full-time professional

### Key Staff

*Note: Does not include officers.*

- Laurie Mittenthal, Sr. Mgr., Community Rels.
- Renette Oklewicz, Dir., Foundation Progs.
- Monica Perez, Grants Admin.
- Tracey Taylor, Community Rels. Specialist
- Tia Waller-Pryde, Dir., Foundation Progs.

## Memberships

### Regional Associations of Grantmakers

- Washington Regional Association of Grantmakers

### Affinity Groups

- Black Philanthropic Alliance
- Funders Together to End Homelessness

### Associations and Other Philanthropic Organizations

- Council on Foundations
- The Nonprofit Roundtable of Greater Washington

## Financial Data

Year ended 2012-12-31

Assets: \$90,573,437 (market value)

Expenditures: \$28,178,477

Total giving: \$22,132,385

Qualifying distributions: \$26,875,349

Giving activities include:

\$20,208,298 for 233 grants (high: \$1,000,000; low: \$1,000)

\$1,924,087 for 1378 employee matching gifts

\$2,967,730 for 3 foundation-administered programs

## Online Communications

- [Grants List](#)
- [Heart Gallery Newsletter](#)
- [Wednesday's Child](#)
- [J.C. Nalle Community School Partnership](#)

## Additional Location Information

County: Fairfax

Metropolitan area: Washington-Arlington-Alexandria, DC-VA-MD-WV

Congressional district: Virginia District 11

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$1,000,000 to National Alliance to End Homelessness, Washington, DC, in 2012.
- \$500,000 to Transitional Housing Corporation, Washington, DC, in 2012.
- \$500,000 to National Center for Children and Families, Bethesda, MD, in 2012.
- \$500,000 to Community of Hope, Washington, DC, in 2012.
- \$450,000 to Montgomery County Coalition for the Homeless, Rockville, MD, in 2012.
- \$315,000 to DC Public Education Fund, Washington, DC, in 2012.
- \$200,000 to Higher Achievement Program, Washington, DC, in 2012.
- \$75,000 to Shelter House, Herndon, VA, in 2012.
- \$50,000 to Main Street Child Development Center, Fairfax, VA, in 2012.
- \$45,000 to Capital Partners for Education, Washington, DC, in 2012.

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## The Humboldt Area Foundation

Last Updated: 2014-08-13

## At A Glance

373 Indianola Rd.  
Bayside, CA United States 95524-9350  
Telephone: (707) 442-2993  
Contact: Kathy VanVleet, Admin. Asst.; Patrick Cleary, Exec. Dir.  
Fax: (707) 442-9072  
E-mail: [kathyv@hafoundation.org](mailto:kathyv@hafoundation.org)  
URL: [www.hafoundation.org](http://www.hafoundation.org)

## Type of Grantmaker

Community foundation

## Financial Data

(yr. ended 2013-06-30)  
Assets: \$90,470,144  
Total giving: \$2,717,169

## EIN

237310660

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Additional e-mail: [patrickc@hafoundation.org](mailto:patrickc@hafoundation.org)

## Background

Established in 1972 in CA by declaration of trust.

The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

## Limitations

Giving limited to Del Norte, Humboldt, and Trinity counties, CA.

No grants to individuals (except from donor-designated funds); generally no grants for endowment funds, unspecified emergency purposes, deficit financing, or operating budgets.

## Purpose and Activities

The foundation seeks to serve as an independent staging ground for residents, individually and in concert, to build social, economic and environmental prosperity in the Redwood, Trinity and Wild Rivers Region. Primary areas of interest include youth, health, community development, human services, arts and culture and public safety. The foundation also operates a resource center that hosts public workshops covering a range of nonprofit issues.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Community Building Grants Program

The program supports a broad spectrum of projects that help build strong communities in the Redwood, Trinity, and Wild Rivers Region. The program is currently accepting submissions from nonprofit charitable or public benefit (federal tax-exempt) organizations, public schools, government agencies, and Native American tribal governments. Applicants' proposals should meet the following criteria to be given priority: 1) addresses a pressing community issue; 2) supports a project or issue that is clearly important to community members and that they are coming together to address; 3) involves the people who are directly impacted by the effort; and 4) makes use of collaborative relationships and partnerships.

### Field-of-Interest Grant Program

The program was created to connect donors with community projects in their specific areas of interest. The program brings together into one grant cycle a collection of funds that focus on specific populations, geographical areas and/or causes. Grants are available for the following categories: Companion Animal Welfare and Rescue; Education; Natural Environment; Senior Opportunities; and Southern Humboldt.

### Holiday Funding Partnership

The Holiday Funding Partnership is a group of local organizations who collaborate annually to provide funding and support to community-based programs during the holiday season. Grants of up to \$2000 will be awarded to programs that provide food and/or clothing to benefit children, families, and seniors in need. For more information about the Holiday Funding Partnership grant opportunity please contact Program Coord, tel.: (707) 442-2993 x314.

## **Native Cultures Fund**

Initiated and led by Native peoples, the mission of this program is to support the renaissance of California Native American arts, culture, sacred sites, and cultural transmission between generations. Funding is provided to individuals as well as nonprofit organizations who are partners with Native artists. See web site for additional information.: [www.nativeculturesfund.org](http://www.nativeculturesfund.org).

## **Scholarships**

North Coast residents have created over 200 scholarship funds at the foundation to honor their loved ones, to support higher education and to help foster the improvement of area students as they pursue their diverse ambitions. Scholarships range from \$250 to \$7,500.

## **Summer Youth Mini-Grants Program**

The foundation provides funding in response to the need to provide positive opportunities for children and youth while school is not in session. Small grants are awarded to agencies to expand and enrich summer recreation programs operating between June and September. Grants are normally made for expenses such as sports and recreational equipment, arts and craft supplies, special events and field trips within HAF's service area and camperships for low-income participants. Applications must be postmarked, delivered, or e-mailed by April 15.

## **Technical Assistance Program**

The foundation provides grants to strengthen and improve organizations, their leadership or operations in the areas of strategic planning, board development, marketing/public relations, collaborations, fundraising planning, financial management, personnel issues, operational assessments and executive coaching. TAP applications and information are confidential and will not affect other potential Humboldt Area Foundation grant funding. TAP grant applications are accepted on the first of each month and grants that are awarded are paid directly to a consultant to cover the costs of their consulting services.

## **Fields of Interest**

### **Subjects**

- Arts
- Children/youth, services
- Civil rights, race/intergroup relations
- Community/economic development
- Crime/violence prevention
- Family services
- Food services
- Health care
- Housing/shelter
- Human services
- Recreation
- Safety/disasters

### **Population Groups**

- Economically disadvantaged

## **Geographic Focus**

- California

## **Types of Support**

- Building/renovation
- Capital campaigns
- Consulting services
- Emergency funds
- Equipment
- General/operating support
- Grants to individuals
- Management development/capacity building
- Matching/challenge support
- Program development
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Financial statement

- Grants list

## Application Information

Visit foundation web site for application forms and additional guidelines per grant type.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Statement of problem project will address
4. Name, address and phone number of organization
5. Copy of IRS Determination Letter
6. How project's results will be evaluated or measured
7. Detailed description of project and amount of funding requested
8. Plans for cooperation with other organizations, if any
9. Contact person
10. Copy of current year's organizational budget and/or project budget

Initial approach: Application, telephone, or e-mail

Copies of proposal: 1

Board meeting date(s): 2nd Wed. of each month

Deadline(s): Oct. 1, Jan. 12, Apr. 1, and July 1 for Community Grant Program grants; varies for others

Final notification: Within 10 weeks for Community Grant Program notification; varies for others

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Vera P. Vietor‡
- Lynn A. Vietor‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Paula Allen \*, Chair.
- Jon Sapper \*, Vice-Chair.
- Jim Anderson \*, Secy.
- Patrick Cleary, Exec. Dir.
- Gary Blatnick
- Kevin Caldwell
- Neal Ewald
- Julie Fulkerson
- Kathryn Lobato
- Greg Nesbitt
- Steve O'Meara
- Terry Supahan

## Staff

### Number of Staff

9 full-time professional

1 part-time professional

5 full-time support

2 part-time support

### Key Staff

*Note: Does not include officers.*

- Deborah Downs, Dir., Finance
- Sara Dronkers, Dir., Grantmaking
- Susan Elliot, Finance Asst.
- Heather Equinoss, Prog. Mgr., Community Strategies
- Elysia Frink, Prog. Asst.
- Wendy Heard, Acct. and Grants Admin.
- Amy Jester, Prog. Mgr., Community Strategies
- Beth Johnson, Prog. Asst.
- Chag Lowry, Prog. Mgr., Community Strategies
- Keytra Meyer, Prog. Coord., Community Strategies
- Jill Moore, Prog. Coord., Community Strategies

- Claire Reynolds, Comm. Coord.
- Jen Rice, Dir., Community Strategies
- Kate Russell, Fund Devel. Coord.
- Warren Schrader, Cont.
- Kathy Van Vleet, Recep.
- Joanna Volz, Recep.
- Cassandra Wagner, Prog. Coord., Donor Srvs. and Planned Giving
- Chris Witt, Dir., Donor Srvs. and Planned Giving
- Mary Wilson, Depa. Asst.

## Memberships

### Regional Associations of Grantmakers

- League of California Community Foundations
- Northern California Grantmakers

### Affinity Groups

- Funders' Network for Smart Growth and Livable Communities
- Grantmakers In the Arts
- Neighborhood Funders Group

### Associations and Other Philanthropic Organizations

- California Association of Nonprofits
- Council on Foundations

## Financial Data

Year ended 2013-06-30

Assets: \$90,470,144 (market value)

Gifts received: \$8,056,138

Expenditures: \$6,482,013

Total giving: \$2,717,169

Qualifying distributions: \$5,296,669

Giving activities include:

\$2,717,169 for grants

## Online Communications

- [Philanthropy's Promise](#)
- [Grants List](#)

## Additional Location Information

County: Humboldt

Congressional district: California District 02

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## Morris Goldseker Foundation of Maryland, Inc.

**Last Updated:** 2014-07-10

### At A Glance

(also known as Goldseker Foundation)

1040 Park Ave., Ste. 310

Baltimore, MD United States 21201-5635

Telephone: (410) 837-5100

Contact: Laurie Latuda Kinkel, Prog. Off.

Fax: (410) 837-7927

E-mail: [laurie@goldsekerfoundation.org](mailto:laurie@goldsekerfoundation.org)

URL: [www.goldsekerfoundation.org](http://www.goldsekerfoundation.org)

### Type of Grantmaker

Independent foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$89,855,843

Total giving: \$2,941,528

**EIN**

520983502

**990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Additional Contact Information**

Laurie Latuda Kinkel tel.: (410) 837-6115

**Background**

Incorporated in 1973 in MD.

Mr. Goldseker, an immigrant to the United States from Poland, founded and was president of the M. Goldseker Co., a real estate firm in Baltimore. The Goldseker will suggests that the foundation give special consideration to charitable organizations which, by loans or grants or other steps, give aid and encouragement to worthy individuals to continue their education, establish themselves in business, overcome such adversities as accident or illness, or maintain or support themselves or their families. The trustees of the foundation, Sheldon and Simon Goldseker, are nephews of the donor. As Mr. Goldseker stipulated in his will, the trustees control the foundation's assets, but all grant decisions are made solely by the selection committee composed of the presidents of the Johns Hopkins University, Morgan State University, and the Associated Jewish Community Federation of Baltimore. All decisions on grant proposals are made within a framework of clearly defined policies. At the discretion of the committee and board, these policies may be subject to modification in response to changing needs and problems in the Baltimore metropolitan area. In accordance with the donor's will, the foundation may not award more than 5 percent of its net income in any calendar year to any single institution. The foundation retains a full-time professional staff to serve as liaison among the board of trustees, the selection committee, and the community at large. The staff is responsible for regularly informing the public of the foundation's policies, priorities, and ongoing grantmaking activities.

**Limitations**

Giving limited to the Baltimore, MD, area.

No support for advocacy or political action groups, religious purposes, arts or cultural affairs, specific diseases or disabilities, or for projects normally financed with public funds.

No grants to individuals, or for building or endowment funds, deficit financing, annual campaigns, or publications.

**Purpose and Activities**

In 2000, the Goldseker Foundation's Board of Trustees and its Selection Committee adopted a two-track approach to grantmaking. This approach designates priority areas that build on existing experience and investments, but it also retains the ability to respond to new ideas and opportunities within the established program areas. The foundation's grantmaking funds will focus on the first-track priority areas. In these areas - community development, regionalism, and the nonprofit sector - the foundation will be a more directly engaged and active partner. The existing grantmaking policies apply to the priority areas. Grants will include a mix of foundation initiatives and projects submitted independently by potential grantees. The second track focuses on the foundation's established program areas: neighborhood development, community affairs, human services, and education.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Non-Profit Management Assistance Grants**

Each year, the foundation dedicates a limited portion of its grants budget to help support specific, well-defined organizational development initiatives of Baltimore City non-profit organizations. Management assistance grant funds principally support the engagement of qualified outside consulting expertise. The foundation will consider applications in the following categories: 1) Strategic Planning; 2) Fund Development and Sustainability; 3) Financial Management Systems Improvement; 4) Program Evaluation; 5) IT Assessment and Planning (not hardware or software purchases); and 6) Board Development, Executive Coaching, and Succession Planning. See foundation web site for further information and guidelines.

**Fields of Interest****Subjects**

- Community development, neighborhood development
- Education
- Housing/shelter, search services
- Human services
- Public affairs, association

**Geographic Focus**

- Maryland

**Types of Support**

- Consulting services
- Matching/challenge support
- Program development
- Program-related investments/loans
- Seed money
- Technical assistance

## **Publications**

- Annual report
- Financial statement
- Informational brochure (including application guidelines)

## **Application Information**

Submit preliminary letter as early as possible before deadlines. See foundation web site for application information, and information on applying for Management Assistance Grants. Association of Baltimore Area Grantmakers Common Grant Application Form accepted.

Application form not required.

Applicants should submit the following:

1. How project will be sustained once grantmaker support is completed
2. Qualifications of key personnel
3. Statement of problem project will address
4. Copy of IRS Determination Letter
5. Brief history of organization and description of its mission
6. How project's results will be evaluated or measured
7. Detailed description of project and amount of funding requested
8. Copy of current year's organizational budget and/or project budget

Initial approach: Letter or telephone inquiry

Copies of proposal: 1

Board meeting date(s): Distribution committee meets 3 times a year (Mar., June, and Oct.)

Deadline(s): Feb. 1, May 1, and Sept. 1

Final notification: Following committee meetings

Additional information: If the project is of interest to the foundation, a Proposal Development Form will be sent to the grantseekers. The foundation's staff is available to provide assistance throughout the application process. Grant applicants must be able to demonstrate adequate administrative capabilities for programs funded and provide the foundation with periodic progress reports. Recipient institutions must be responsible for a financial accounting of how the grants have been utilized.

## **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Morris Goldseker‡

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Sheldon Goldseker \*, Chair.
- Simon Goldseker \*, Vice-Chair.
- Matthew D. Gallagher, C.E.O. and Pres
- Sheila L. Purkey, V.P., Secy.-Treas. and Cont.
- Ana Goldseker
- Deby Goldseker
- Sharna Goldseker
- Susan B. Katzenberg
- Howard M. Weiss

## **Advisory Selection Committee**

- Ronald J. Daniels  
Affiliation(s):  
*Johns Hopkins Univ., Pres.*
- Marc B. Terrill  
Affiliation(s):  
*The Associated: Jewish Community Federation of Baltimore, Pres.*
- David Wilson



Affiliation(s):  
*Morgan State University, President*

## Staff

### Number of Staff

2 full-time professional  
2 part-time professional  
1 full-time support

### Key Staff

*Note: Does not include officers.*

- Laurie Latuda Kinkel, Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Association of Baltimore Area Grantmakers

### Affinity Groups

- Neighborhood Funders Group

### Associations and Other Philanthropic Organizations

- Greater Baltimore Committee
- Maryland Association of Nonprofit Organizations

## Financial Data

Year ended 2012-12-31

Assets: \$89,855,843 (market value)

Expenditures: \$4,657,475

Total giving: \$2,941,528

Qualifying distributions: \$4,175,778

Giving activities include:

\$2,941,528 for 92 grants (high: \$261,550)

## Online Communications

- [Facebook](#)
- [Grants Database](#)
- [Twitter](#)

## Additional Location Information

County: Baltimore City

Metropolitan area: Baltimore-Towson, MD

Congressional district: Maryland District 07

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## Community Foundation of the Eastern Shore, Inc.

**Last Updated:** 2014-07-30

### At A Glance

1324 Belmont Ave., Ste. 401

Salisbury, MD United States 21804

Telephone: (410) 742-9911

Contact: For grants: Heather Towers, Prog. Off.

Fax: (410) 742-6638

E-mail: [cfes@cfes.org](mailto:cfes@cfes.org)

URL: [www.cfes.org](http://www.cfes.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2013-06-30)

Assets: \$88,723,926

Total giving: \$5,423,110

## **EIN**

521326014

## **990**

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## **Additional Contact Information**

Grant inquiry e-mail: [htowers@cfes.org](mailto:htowers@cfes.org)

## **Background**

Established in 1984 in MD.

## **Limitations**

Giving limited to the Lower Eastern Shore of MD, area, encompassing Somerset, Wicomico, and Worcester counties.

No support for sectarian religious programs.

No grants to individuals (except for scholarships), or for annual campaigns, building campaigns, fundraising campaigns, major capital campaigns, building or endowment funds, continuing support, land acquisition, general operating support, playground equipment, or debt retirement or budget deficits; no program-related investments.

## **Purpose and Activities**

The foundation serves the Lower Eastern Shore of Maryland, specifically Somerset County, Wicomico County, and Worcester County. Established in 1984, the foundation is a local philanthropic expert committed to connecting donors with community needs. Gifts to the foundation create permanent endowment funds that steadily grow in value over time and produce income for grants to local charitable nonprofit organizations. The foundation seeks to encourage philanthropy and strengthen our communities.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Community Needs Grant Program**

The foundation's Community Needs Grant Program provides program support to a broad range of charitable programs. Applicants must be 501c3 nonprofit organizations, faith-based organizations providing non-sectarian programs or eligible programs within government agencies serving citizens on the Lower Eastern Shore of Maryland (specifically Somerset, Wicomico and/or Worcester County). Grants are typically in the \$500-5,000 range. Interested applicants are encouraged to review the Community Needs Grant Application and Guidelines on the foundation's web site.

### **Education Grants Program**

The foundation provides support for classroom-based programs in public and private schools (pre-K through 12th grade) on the Lower Eastern Shore of Maryland (specifically Somerset, Wicomico and Worcester County). The application deadline is generally in Aug./Sept. of each year; visit foundation Web site for more information.

### **Scholarships**

The foundation administers over 90 local scholarship funds. Each scholarship fund has its own application, guidelines and eligibility criteria, which may include specific geographic area, high school, academic achievement, financial need and field of study. See web site for additional information.

### **Small Grants Program**

The foundation's Small Grants Program address a wide range of needs including pilot projects, emergencies, organizational improvement and capacity building and equipment purchases. The maximum application amount is \$2,000; visit the foundation's web site for more information.

## **Fields of Interest**

### **Subjects**

- Arts
- Community/economic development
- Education
- Environment
- Health care
- Higher education
- Historic preservation/historical societies
- Human services

### **Population Groups**

- Children/youth
- Girls
- Women

- Youth

## Geographic Focus

- Maryland

## Types of Support

- Conferences/seminars
- Consulting services
- Emergency funds
- Equipment
- Management development/capacity building
- Program development
- Scholarships--to individuals
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Financial statement
- Informational brochure
- Newsletter

## Application Information

Visit foundation web site for application form and guidelines per grant type.

Application form required.

Applicants should submit the following:

1. Name, address and phone number of organization
2. Contact person
3. Population served
4. Detailed description of project and amount of funding requested
5. Statement of problem project will address
6. Plans for cooperation with other organizations, if any
7. Timetable for implementation and evaluation of project
8. How project's results will be evaluated or measured
9. Copy of current year's organizational budget and/or project budget
10. Copy of IRS Determination Letter
11. Listing of board of directors, trustees, officers and other key people and their affiliations
12. Copy of most recent annual report/audited financial statement/990
13. Signature and title of chief executive officer

Initial approach: Letter or telephone

Copies of proposal: 1

Board meeting date(s): Feb., Apr., June, Aug., Oct., and Dec.

Deadline(s): Feb. 1 and Aug. 1 for Community Needs Grant Program; varies for others

Final notification: Apr. and Oct. for Community Needs Grant Program; varies for others

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Melody S. Nelson \*, Chair.  
Affiliation(s):  
*Nelson Insurance Agency, Inc., Owner*
- John J. Allen \*, Vice-Chair.  
Affiliation(s):  
*Delmarva Power, V.P.*
- Dr. Doug Wilson \*, C.E.O. and Pres.
- Erica N. Joseph \*, V.P., Community Investment
- James R. Thomas, Jr. \*, Secy.
- David A. Vorhis \*, Treas.  
Affiliation(s):  
*Webb, Burnett, Cornbrooks, Wilber, Vorhis, Douse & Mason, Attorney*

- David Plotts, Cont.
- James W. Almand  
Affiliation(s):  
*Ayres, Jenkins, Goryd & Almand, P.A., Attorney*
- John P. Barrett  
Affiliation(s):  
*Barrett Chevy, Dodge, Chrysler, Jeep, Co-Owner*
- Todd E. Burbage  
Affiliation(s):  
*Burbage Properties, Inc., Developer*
- Thomas K. Coates  
Affiliation(s):  
*Coates, Coates, & Coates, P.A., Attorney*
- Jane R. Corcoran
- Charles G. Goslee
- Dr. Carolyn Johnston  
Affiliation(s):  
*Wicomico County Board of Education, Supervisor, Reading*
- Andy Kim  
Affiliation(s):  
*Kim and Associates, P.A., Principal*
- Dwight W. Marshall, Jr.  
Affiliation(s):  
*Nationwide Insurance, Agent*
- Kathleen G. McLain  
Affiliation(s):  
*WMDT TV-47, Genl. Mgr.*
- James F. Morris  
Affiliation(s):  
*Shore Distributors, Inc., Pres.*
- Susan K. Purnell  
Affiliation(s):  
*Kuhn's Jewelers, Owner*
- Ernest R. Satchell
- John M. Stern, Jr.  
Affiliation(s):  
*PKS Companies, P.A., Partner*
- Greg Tawes  
Affiliation(s):  
*BB& T Bank, Sr. V.P.*
- Donald K. Taylor
- Lauren C. Taylor
- Louis H. Taylor  
Affiliation(s):  
*Stephen Decatur High School, Principal*
- Michael P. Truitt  
Affiliation(s):  
*Merril Lynch & Co., Inc., V.P. and Financial Advisor*
- Stephanie T. Willey  
Affiliation(s):  
*Comcast Spotlight, Sales Manager*
- Julius D. Zant, M.D.  
Affiliation(s):  
*Peninsula Regional Health System, Neurosurgeon*

## **Staff**

### **Number of Staff**

8 full-time professional

## Key Staff

*Note: Does not include officers.*

- Sharon L. Dickson, Finance Off.
- Anne Schoolcraft, Mktg. and Public Rels. Off.
- Patti Strausburg, Office Admin.
- Elizabeth J. Summers, Dir., Devel. and Philanthropic Svcs.
- Heather Towers, Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Association of Baltimore Area Grantmakers

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Maryland Association of Nonprofit Organizations
- Maryland Community Foundations Association

## Financial Data

Year ended 2013-06-30

Assets: \$88,723,926 (market value)

Gifts received: \$4,742,431

Expenditures: \$6,238,774

Total giving: \$5,423,110

Qualifying distributions: \$5,559,491

Giving activities include:

\$5,166,559 for 87 grants (high: \$1,090,000

\$256,551 for 69 grants to individuals

## Online Communications

- [Vimeo](#)
- [Facebook](#)
- [YouTube](#)
- [LinkedIn](#)
- [Twitter](#)

## Additional Location Information

County: Wicomico

Metropolitan area: Salisbury, MD

Congressional district: Maryland District 01

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# The Community Foundation of Lorain County

**Last Updated:** 2014-07-09

## At A Glance

(formerly The Community Foundation of Greater Lorain County)

9080 Leavitt Rd.

Elyria, OH United States 44035

Telephone: (440) 984-7390

Contact: Brian R. Frederick, C.E.O.; For grants: Linda Ong Styer, Sr. Prog. Off.

Fax: (440) 984-7399

E-mail: [info@peoplewhocare.org](mailto:info@peoplewhocare.org)

URL: [www.peoplewhocare.org](http://www.peoplewhocare.org)

## Type of Grantmaker

Community foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$88,644,009

Total giving: \$4,500,728

## EIN

## Additional Contact Information

Additional e-mail: [bfrederick@peoplewhocare.org](mailto:bfrederick@peoplewhocare.org); Grant inquiry e-mail: [lsyter@peoplewhocare.org](mailto:lsyter@peoplewhocare.org)

## Background

Incorporated in 1980 in OH.

Created in 1980 with a challenge grant from the Nordson Foundation, the foundation acts as Lorain County's permanent endowment and is made up of hundreds of charitable funds established by generous donors, businesses, organizations, schools and churches. Income earned through well-managed investments is distributed annually in the form of grants and scholarships to local nonprofit institutions and students. More than 2% of Lorain County's population makes a gift to the foundation each year. The foundation is governed by 19 member Board of Directors each of whom serve four-year terms. Board members reflect the diversity of this community and are elected through a nomination process. The foundation is managed by a professional staff of eleven.

## Limitations

Giving primarily in Lorain County, OH.

No support for religious purposes, street repair, government services, public or non-public school services required by law, or self-help clubs that meet the needs of a small population.

No grants to individuals (except for scholarships), or for annual campaigns, medical research, deficit financing, membership fees, tickets for benefits, tours, equipment, group travel, or capital campaigns; no loans.

## Purpose and Activities

The foundation seeks to improve the quality of life and to instill a greater sense of unity in the Greater Lorain County community by mobilizing individuals to become active partners in building a better community; providing a permanent instrument for receiving and managing charitable gifts and bequests; supporting innovative programs and acting as a catalyst in identifying problems and sharing information with individuals, other foundations, corporations, and organizations; and exercising and promoting leadership in meeting the changing needs and opportunities of the entire community.

## Fields of Interest

### Subjects

- Arts
- Community development, neighborhood development
- Economic development
- Education
- Environment
- Health care
- Health organizations, association
- Human services

### Population Groups

- African Americans/Blacks
- Asians/Pacific Islanders
- Children/youth
- Hispanics/Latinos
- Women
- Youth

## Geographic Focus

- Ohio

## Types of Support

- General/operating support
- Matching/challenge support
- Program development
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report (including application guidelines)
- Financial statement
- Informational brochure (including application guidelines)
- Newsletter
- Program policy statement

## Application Information

Grantseekers should contact the Sr. Prog. Off. to discuss the proposal before submitting an application. Visit foundation web site for application form and guidelines.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. How project will be sustained once grantmaker support is completed
3. Signature and title of chief executive officer
4. Results expected from proposed grant
5. Qualifications of key personnel
6. Population served
7. Name, address and phone number of organization
8. Copy of IRS Determination Letter
9. Brief history of organization and description of its mission
10. Copy of most recent annual report/audited financial statement/990
11. How project's results will be evaluated or measured
12. Listing of board of directors, trustees, officers and other key people and their affiliations
13. Detailed description of project and amount of funding requested
14. Plans for cooperation with other organizations, if any
15. Contact person
16. Copy of current year's organizational budget and/or project budget
17. Additional materials/documentation

Initial approach: Letter or telephone

Copies of proposal: 2

Board meeting date(s): Bimonthly

Deadline(s): Feb. 1 and July 1 for general grants

Final notification: July and Dec. for general grants

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Jim Vandemark \*, Chair.  
Affiliation(s):  
*Vandemark Jewelers, Owner*
- Tim Harris \*, Vice-Chair.
- Brian R. Frederick \*, C.E.O. and Pres.
- Sandhya Subramanian \*, Secy.  
Affiliation(s):  
*Oberlin College, Chief Legal Counsel*
- Susan J. Bowers \*, Treas.  
Affiliation(s):  
*Mercy Allen Hospital, Pres.*
- Cheryl McKenna \*, C.F.O.
- Farnaz Ansari-Berna \*, Chair., Grants Comm.  
Affiliation(s):  
*PNC Wealth Management, Professional Partner*
- Sharon Furcron \*, Chair., Governance Comm.  
Affiliation(s):  
*General Electric, Product Mgr., NA Components*
- Karen Wells \*, Chair., Advancement Comm.  
Affiliation(s):  
*Lorain County Community College, Exec. in Residence*
- Joel Arrendondo  
Affiliation(s):  
*Sunnyside Toyota, Salesman Assoc.*

- J. Lawry Babitt
- Raymond L. Cushing  
Affiliation(s):  
*Nordson Corporation, Treas.*
- Chris Bellamy  
Affiliation(s):  
*Cohen Fund Audit Services, Partner*
- Kevin Donovan  
Affiliation(s):  
*Fauver, Keyse-Walker and Donovan, Partner*
- Joseph F. Miclat  
Affiliation(s):  
*Miclat and Miclat, Attorney*
- Ruth Miller
- Morgan Parsons
- Kris Putnam-Walkerly  
Affiliation(s):  
*Putnam Community Investment Consulting, Inc., Pres.*
- Margarita Quinones  
Affiliation(s):  
*FirstMerit Bank, Community Reinvestment Mktg. Mgr.*
- Samuel Speck, III  
Affiliation(s):  
*Fox Veterinary Hospital, Owner*
- Eric Woidke  
Affiliation(s):  
*Ancora Group, V.P.*

## Staff

### Number of Staff

7 full-time professional

3 full-time support

### Key Staff

*Note: Does not include officers.*

- Theresa Eged, IT Mgr.
- Ramona Grigsby, Prog. Off.
- Nancy Huller, Acct.
- Angela Lee, Fdn. Liaison
- Rachel Ocasio, Rels. Mgr.
- Linda Ong Styer, Sr. Prog. Off.
- Danielle Zechman, Advancement Off.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Ohio

### Associations and Other Philanthropic Organizations

- Council on Foundations
- Transatlantic Community Foundation Network

## Financial Data

Year ended 2012-12-31

Assets: \$88,644,009 (market value)

Gifts received: \$3,250,810

Expenditures: \$4,514,514

Total giving: \$4,500,728

Qualifying distributions: \$4,500,728

Giving activities include:

\$4,500,728 for grants

## Online Communications

- [YouTube](#)



- [Facebook](#)
- [Flickr](#)
- [LinkedIn](#)
- [Twitter](#)

## Additional Location Information

County: Lorain

Metropolitan area: Cleveland-Elyria-Mentor, OH

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## Princeton Area Community Foundation, Inc.

**Last Updated:** 2014-02-21

### At A Glance

(formerly The Princeton Area Foundation, Inc.)

15 Princess Rd.

Lawrenceville, NJ United States 08648-2301

Telephone: (609) 219-1800

Contact: Nancy W. Kieling, Pres.

Fax: (609) 219-1850

E-mail: [info@pacf.org](mailto:info@pacf.org)

URL: [www.pacf.org](http://www.pacf.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$88,395,021

Total giving: \$6,525,163

### EIN

521746234

### 990

[2012](#) [2011](#) [2010](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Background

Established in 1991 in NJ.

### Limitations

Giving limited to Mercer County, NJ and surrounding communities in Hunterdon, Somerset, Middlesex, Monmouth and Burlington counties.

No support for fraternal and religious activities.

No grants for building renovations and new facility construction, capital and endowment campaigns and projects, fundraising appeals and events, field trips (unless part of a larger educational effort), sports activities (unless part of a larger educational effort), or sponsorship of events (sponsorships are occasionally made as part of the foundation's marketing efforts, and solely at the foundation's initiation)

### Purpose and Activities

The foundation seeks to promote philanthropy across central New Jersey by managing charitable funds created by members of the community, providing competitive discretionary grants to nonprofits, and by making advised grants to nonprofits after consultation with individuals or groups of donors. The foundation also serves as a convener and catalyst, leveraging new funds, and creating partnerships to enable residents to solve community problems.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Building the Region's Social Capital

Grants up to \$50,000 are made to 501(c)(3) nonprofits for efforts that address a shared problem or take advantage of a shared opportunity, among multiple municipalities or within a single borough, city, or township. The foundation seek to increase the social capital in Greater Mercer County by increasing the number and strength of social networks in the region, and the ways they motivate people to do things for and with each other. Research has shown that communities with strong bonds have higher educational achievement, better performing governments, faster economic growth, less crime, and less violence.

People who live in these communities report being happier and healthier, and they enjoy a longer life expectancy. In communities with strong bonds, it is easier to mobilize people to tackle problems and undertake activities that benefit everyone. The foundation identifies projects that develop these social networks and use them to address problems and opportunities in planning, economic development, civic engagement, philanthropy, volunteerism, care of the environment, and the arts, among others. Projects in these areas are eligible for support. So are activities that bring people together to explore and address barriers to relating to each other. Ongoing activities, as opposed to one-time events, receive priority. Visit the foundation's web site for more information.

### **Low-Income Individuals and Families**

Grants up to \$25,000 are made to 501(c)(3) nonprofit organizations whose applications demonstrate they are capable of helping low-income individuals and/or families. Applications can be submitted for program support or operating support. Program support may be directed at one or more project areas, such as economic self-sufficiency, education, health, housing, nutrition, safety, supportive services, or youth development, among others. Unrestricted Support is available to organizations demonstrating strong management, keen thinking about their capacity, and with a current, board-approved strategic plan in place. Grants are limited to organizations with a greater Mercer County focus.

### **Scholarship Funds**

The foundation administers several scholarships to graduating high school residents of the Greater Mercer County area who are entering four-year colleges or universities. Each scholarship has its own unique eligibility requirements, such as attendance at a particular high school, or to pursue particular fields of study, such as education or the allied health profession. See web site for additional information.

## **Fields of Interest**

### **Subjects**

- Community/economic development
- Education
- Health care
- Human services
- Minorities/immigrants, centers/services
- Substance abuse, services

### **Population Groups**

- Economically disadvantaged
- Minorities

### **Geographic Focus**

- New Jersey

## **Types of Support**

- Continuing support
- Curriculum development
- Emergency funds
- General/operating support
- Program development
- Scholarship funds
- Scholarships--to individuals
- Seed money
- Technical assistance

## **Publications**

- Application guidelines
- Annual report
- Grants list
- Informational brochure
- Newsletter

## **Application Information**

Visit foundation web site for application forms and information. The foundation recommends attending a grant information session before applying for a grant.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Signature and title of chief executive officer
3. Qualifications of key personnel
4. Statement of problem project will address

5. Name, address and phone number of organization
6. Brief history of organization and description of its mission
7. Geographic area to be served
8. Detailed description of project and amount of funding requested
9. Contact person
10. Copy of current year's organizational budget and/or project budget
11. Copy of most recent annual report/audited financial statement/990
12. Listing of board of directors, trustees, officers and other key people and their affiliations

Initial approach: Submit application form and attachments

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): Varies

Final notification: 3 months

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- David R. Scott \*, Chair.  
Affiliation(s):  
*Planned Parenthood Association of the Mercer Area, Tr.*  
*Princeton Day School, Tr.*
- John S. Watson, Jr. \*, Vice-Chair.  
Affiliation(s):  
*D&*  
*R Greenway Land Trust, V.P.*
- Nancy W. Kieling \*, Pres.
- Michelle Cash \*, V.P., Grants and Progs.
- Elizabeth B. Wagner \*, V.P., Devel.
- Anne LaBate \*, Secy.  
Affiliation(s):  
*Segal LaBate Commerical Real Estate, Pres.*  
*Mercer Regional Chamber of Commerce, Dir.*
- Laura J. Longman, C.F.O.
- Gordon Danser \*, Treas. and Chair., Audit Comm.  
Affiliation(s):  
*Danser, Balaam &*  
*Frank, Partner*
- William P. Burks, M.D. \*, Chair., Asset Building Comm.
- Andrew K. Golden \*, Chair., Investment Comm.  
Affiliation(s):  
*Princeton University Investment Company, Pres.*  
*Rutgers Preparatory School, Tr.*  
*New York Society of Security Analysts, Member*
- Samuel W. Lambert, III \*, Chair., Grants Comm.  
Affiliation(s):  
*Bunbury Company, Tr.*  
*Curtis McGraw Foundation, Tr.*  
*Open Space Institute, Tr.*  
*Planned Parenthood Association of the Mercer Area, Tr.*
- John D. Wallace \*, Chair., Audit Comm.
- Richard Bilotti  
Affiliation(s):  
*NJ Italian American Heritage and Cultural Commission, Chair.*  
*Trenton Education Dance Institute, Pres.*  
*NJ Press Foundation, Tr.*
- Anthony "Skip" Cimino  
Affiliation(s):  
*Robert Wood Johnson University Hospital Hamilton, C.E.O. and Pres.*
- Sonia Delgado  
Affiliation(s):  
*Princeton Public Affairs Group, Inc., Sr. Exec.*
- Liz Erickson  
Affiliation(s):

*Isles Inc., Tr.*

- Carol P. Herring
- Patricia U. Herst  
Affiliation(s):  
*Goldstein & Herst, Shareholder*
- Eleanor Horne  
Affiliation(s):  
*Homefront, Tr.*  
*Princeton Day School, Tr.*  
*D&R Greenway Land Trust, Tr.*  
*Young Audiences of New Jersey, Tr.*
- Meredith C. Moore
- Jeffrey F. Perlman  
Affiliation(s):  
*Borden Perlman, Partner*  
*Greenwood House Foundation, Pres.*  
*Greenwood House, Home for the Jewish Aged, Tr.*
- Patrick L. Ryan  
Affiliation(s):  
*Hopewell Valley Community Bank, Chair. and Founder*  
*Princeton Regional Chamber of Commerce, Vice-Chair.*  
*New Jersey Clean Communities Council, Pres.*
- Carolyn Sanderson  
Affiliation(s):  
*J.P. Morgan Private Bank, Princeton, Managing Dir.*  
*McCarter Theatre, Tr.*
- Lisa Skeete Tatum  
Affiliation(s):  
*Princeton Healthcare System Foundation, Board Member*  
*Harvard Business School, Pres.*  
*Henry Crown, Fellow*  
*Cornell University, Tr.*
- Thomas P. Weidner  
Affiliation(s):  
*Windels Marx, Counsel*

## **Staff**

### **Number of Staff**

4 full-time professional

2 full-time support

### **Key Staff**

*Note: Does not include officers.*

- Myriam Padro, Admin.
- Trisha Volk, Donor Svcs. Assoc.

## **Memberships**

### **Regional Associations of Grantmakers**

- Council of New Jersey Grantmakers

### **Associations and Other Philanthropic Organizations**

- Council on Foundations

## **Financial Data**

Year ended 2012-12-31

Assets: \$88,395,021 (market value)

Gifts received: \$13,087,947

Expenditures: \$7,565,242

Total giving: \$6,525,163

Qualifying distributions: \$7,007,707

Giving activities include:

\$6,078,801 for 209 grants (high: \$471,100)  
\$145,896 for 39 grants to individuals

## Online Communications

- [Twitter](#)

## Additional Location Information

County: Mercer

Metropolitan area: Trenton-Ewing, NJ

Congressional district: New Jersey District 12

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## Barra Foundation, Inc.

**Last Updated:** 2014-06-05

### At A Glance

200 W. Lancaster Ave., Ste. 202  
Wayne, PA United States 19087-4046  
Telephone: (610) 964-7601  
Contact: Kristina Wahl, Pres.  
Fax: (610) 964-0155  
E-mail: [kwahl@barrafoundation.org](mailto:kwahl@barrafoundation.org)  
URL: [www.barrafoundation.org](http://www.barrafoundation.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$88,047,212  
Total giving: \$4,241,196

### EIN

236277885

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

E-mail address for Kristi Poling, Prog. Off.: [kpoling@barrafoundation.org](mailto:kpoling@barrafoundation.org); e-mail address for Kate Houstoun, Prog. Off.: [khoustoun@barrafoundation.org](mailto:khoustoun@barrafoundation.org); e-mail address for Stephanie Mullen, Admin. Asst.: [smullen@barrafoundation.org](mailto:smullen@barrafoundation.org)

### Background

Incorporated in 1963 in DE.

### Limitations

Giving limited to organizations in the 5 county Philadelphia, PA, area (Bucks, Chester, Delaware, Montgomery and Philadelphia)

No support for religious organizations, or for environmental or preservation groups.

No grants to individuals, or for annual or capital campaigns, building or endowment funds, operating budgets, deficit drives, scholarships, fellowships, ongoing programs, publications, catalogues or exhibitions; no loans.

### Purpose and Activities

The foundation seeks to support and encourage innovation, a key element to discovering new and more effective ways to serve the ever-changing needs in communities. It funds organizations and projects that enable the foundation to achieve greater social impact in the Philadelphia five-county region through strategic grantmaking in the areas of arts and culture, education, health, and human services. The foundation pursues two goals in its grantmaking: 1) to advance the health, education, well-being, achievement, and life prospects of low-income, underserved individuals and communities, and 2) to enrich the quality of life for all by promoting the sustainability of a vibrant arts and cultural community.

### Fields of Interest

#### Subjects

- Arts

- Education
- Human services

## Geographic Focus

- Pennsylvania

## Types of Support

- Consulting services
- General/operating support
- Management development/capacity building
- Program development
- Program evaluation

## Application Information

See foundation web site for complete policies, guidelines and application form.

Application form required.

Applicants should submit the following:

1. Brief history of organization and description of its mission
2. Detailed description of project and amount of funding requested
3. Copy of current year's organizational budget and/or project budget

Initial approach: Proposal

Copies of proposal: 1

Board meeting date(s): Dec. and as appropriate

Deadline(s): None

Final notification: 3 to 6 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Robert L. McNeil, Jr.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Seymour S. Preston, III \*, Chair.
- Kristina Wahl, Pres.
- Victoria M. LeVine \*, Secy.
- Eric C. Andersen
- Patrick P. Coyne
- A. Louis Denton
- William Harral, III
- Frazierita D. Klasen
- Joanna M. Lewis
- Collin F. McNeil
- Robert L. McNeil, III

## Staff

### Number of Staff

3 full-time professional

1 part-time support

### Key Staff

*Note: Does not include officers.*

- Kate Houstoun, Prog. Off.
- Kristi Poling, Prog. Off.
- Stephanie Mullen, Admin. Asst.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Network Greater Philadelphia

### Affinity Groups

- Exponent Philanthropy

## Financial Data

Year ended 2012-12-31

Assets: \$88,047,212 (market value)

Gifts received: \$1,853,507

Expenditures: \$5,172,006

Total giving: \$4,241,196

Qualifying distributions: \$4,768,145

Giving activities include:

\$4,241,196 for 423 grants (high: \$800,000; low: \$1,000)

## Additional Location Information

County: Delaware

Metropolitan area: Philadelphia-Camden-Wilmington, PA-NJ-DE-MD

Congressional district: Pennsylvania District 07

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## Oshkosh Area Community Foundation

**Last Updated:** 2014-08-13

### At A Glance

(formerly Oshkosh Foundation)

230 Ohio St., Ste. 100

Oshkosh, WI United States 54902

Telephone: (920) 426-3993

Contact: Diane Abraham, C.E.O.; For grants: Amy Putzer, Dir., Progs.

Fax: (920) 426-6997

E-mail: [info@oshkoshareaf.org](mailto:info@oshkoshareaf.org)

URL: [www.oshkoshareacf.org](http://www.oshkoshareacf.org)

### Type of Grantmaker

Community foundation

### Financial Data

(yr. ended 2013-06-30)

Assets: \$87,475,004

Total giving: \$4,057,085

### EIN

392034571

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2005](#) [2004](#) [2003](#)

### Additional Contact Information

Additional e-mail: [diane@oshkoshareacf.org](mailto:diane@oshkoshareacf.org); Grant inquiry e-mail: [amy@oshkoshareacf.org](mailto:amy@oshkoshareacf.org)

### Background

Established in 1928 in WI by declaration of trust.

### Limitations

Giving limited to Green Lake, Waushara, and Winnebago, counties, WI.

No grants to individuals (except for scholarships), or for deficit financing, research, or publications; no loans.

### Purpose and Activities

The foundation seeks to address community needs by providing leadership through grantmaking and fund development.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Basic Needs/Self-Sufficiency

Two grant programs: 1) Green Lake Basic Needs supports charitable projects and programs to meet Green Lake County area residents' emergency basic needs; and 2) Basic Needs Giving Partnership supports long-term solutions that address root

causes of poverty.

### **Capital Campaign Grants**

Foundation funds are generally provided as challenge grants, requiring at least a 1:1 match for raising funds from local donors. Payments for grants over \$50,000 are typically spread over several years. Visit foundation web site for application guidelines.

### **Celebrate Education Grants**

The foundation seeks to foster educational excellence in the Oshkosh area schools, public and parochial, by funding educational opportunities. Grant awards typically range from \$500 to \$2,000. Visit foundation web site for more information.

### **City Block Grants Consortium**

Grants are funded from four different areas: 1) City Block Grants, which can be used for a variety of public activities if at least 51 percent of people served with these funds have low and moderate income. The funds can be used for labor, supplies, materials and other costs related to the implementation of the program; 2) Winnebago County Brighter Futures Funding, which is to help children, youth and families achieve by promoting healthy families and children/youth, children's school readiness, children safe in their families and communities and youth successful navigation to adulthood; 3) Oshkosh Area United Way, by which programs should be new and innovative, collaborative and must serve Oshkosh residents; and 4) Oshkosh Area Community Foundation Funding, by which programs must address human concerns, improve the quality of life in our communities and show collaborative efforts with other organizations to sustain our communities. Visit foundation web site for more information.

### **Community Art Grants**

The foundation funds arts organizations, in the interest areas of strengthening and stabilizing arts organizations, providing and enhancing educational programs, and improving opportunities for cultural activities. This program also supports arts related projects, concerts, or performing art series. These grants are made possible through challenge grant funding from the Wisconsin Arts Board and matching grants provided by the foundation. Visit foundation web site for application guidelines.

### **Community Impact Grants**

These grants support innovative programs that help strengthen our communities. Grant criteria includes project meets emerging community needs, strengthens local nonprofit organizations, or better serves the people of the community.

### **Education Grants**

Two types of grants are available to support teachers and schools: 1) Celebrate Education Grants, for K-12 teachers (public and parochial) in the Oshkosh Area School District for a project that enriches the educational experience, motivates or inspires students, fills a specific needs, demonstrates a sense of community and is fun for kids; and 2) Rudoy Awards for Teaching Excellence, for teachers from public and parochial middle and high schools to receive a monetary award to be used for either their own professional development or for a specific program or project in their classrooms. See web site for additional information.

### **Older Adults Grants**

Targeted grant funding supports agencies and organizations providing services to benefit the elderly in the greater Oshkosh area. Grant Criteria includes projects that: 1) serve adults age 55 or older; 2) serve adults in economic need; 3) affect the health and well being of older adults in our community; and 4) serve adults in the Oshkosh area. Visit foundation web site for more information.

### **Scholarships**

The foundation offers a wide range of scholarships, each with specific eligibility criteria. Most scholarships are open to graduating high school seniors pursuing an undergraduate degree, though some graduate school scholarships are also available. Scholarships support both two-year technical and four-year college degrees and typically range from \$250 to \$1,000. Scholarship awards must be applied to tuition and fees, and cannot be used for books, room and board, or other expenses. See web site for additional information.

### **Youth Grants**

The foundation offers funding opportunities for projects and programs that support youth development; visit foundation web site for more information.

## **Fields of Interest**

### **Subjects**

- Arts
- Children/youth, services
- Community/economic development
- Education
- Higher education
- Recreation

### **Population Groups**

- Aging
- Children/youth
- Girls
- Women



- Youth

## Geographic Focus

- Wisconsin

## Types of Support

- Building/renovation
- Capital campaigns
- Conferences/seminars
- Continuing support
- Emergency funds
- Endowments
- Equipment
- General/operating support
- Management development/capacity building
- Matching/challenge support
- Program development
- Program-related investments/loans
- Scholarship funds
- Scholarships--to individuals
- Seed money

## Publications

- Application guidelines
- Annual report
- Financial statement
- Informational brochure
- Newsletter

## Application Information

Visit foundation web site for application forms, guidelines, and specific deadlines. Applications not accepted unless service area requirements and funding guidelines are met.

Application form required.

Initial approach: Submit application form and attachments

Copies of proposal: 1

Board meeting date(s): 8 times a year

Deadline(s): Varies

Final notification: 12 weeks

## Officers and Board of Governors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Beth Wyman \*, Pres.
- Mark Lasky \*, V.P.  
Affiliation(s):  
*Sadoff Iron and Metal Company, C.E.O.*
- Diane Abraham \*, Pres. and C.E.O.
- Jason Hirschberg \*, Secy.  
Affiliation(s):  
*Hirschberg Law, LLC, Attorney*
- Cathy Luther \*, Treas.
- Nancy Albright, Dir. Emeritus
- John Bermingham, Dir. Emeritus
- Larry Bittner, Dir. Emeritus
- Mike Castle, Dir. Emeritus
- Marcy Coglianese, Dir. Emeritus
- Bob Hergert, Dir. Emeritus
- Tom Harenburg, Dir. Emeritus
- Ginna Nelson, Dir. Emeritus
- Jack Schloesser, Dir. Emeritus
- Pat Seubert, Dir. Emeritus
- Sam Sundet, Dir. Emeritus
- Jack Sullivan, Dir. Emeritus
- Bill Wyman, Dir. Emeritus

- Gary Yakes, Dir. Emeritus
- Dave Elbing
- Peter Lang
- Jim Malczewski
- Affiliation(s):  
*Virchow Krause LLP, Partner*
- Sylvia McDonald
- Kate Pfaendtner
- Peter Prickett
- Bruce Rounds
- Steve Sorenson
- Carol Sullivan
- Affiliation(s):  
*the Sullivan Group, LLP, Owner*
- Jeff Trembly

## Trustees

- Advisory Small Cap Value
- Artisan International Value
- Associated Banc-Corp
- BMO Harris Bank
- Capital Counsel
- Colchester Global Bond
- Forester Offshore
- Gryphon International Growth
- JPMorgan Chase Bank, N.A.
- McClain Select Value
- PIMCO
- Post Traditional High Yield Fund
- Reinhart Partners
- TIFF ARP III
- UBP/Smith Barney
- Vanguard

## Staff

### Number of Staff

5 full-time professional  
 1 part-time professional  
 1 full-time support  
 1 part-time support

### Key Staff

*Note: Does not include officers.*

- Dawn Clark, Admin. Asst.
- Connolly-Keesler, Pres. and C.E.O.
- Cheryl Fowler, Education Coord.
- Karlene Grabner, Dir., Donor Srvs.
- Debbie Herman, Acct.
- Lindsey Nowak, Ops. Coord.
- Amy Putzer, Dir., Progs.
- Kate Salter, Devel. and Comms. Asst.
- Joy Wick, Mktg. Coord.

## Memberships

### Regional Associations of Grantmakers

- Donors Forum of Wisconsin

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2013-06-30

Assets: \$87,475,004 (market value)

Gifts received: \$5,358,462

Expenditures: \$4,707,217

Total giving: \$4,057,085  
Qualifying distributions: \$4,057,085  
Giving activities include:  
\$4,057,085 for grants

## Online Communications

- [Flickr](#)
- [YouTube](#)
- [Facebook](#)
- [Twitter](#)
- [E-Newsletter](#)

## Additional Location Information

County: Winnebago  
Metropolitan area: Oshkosh-Neenah, WI  
Congressional district: Wisconsin District 06

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$33,900 to Fox Valley Technical College Foundation, Appleton, WI, in 2012. For Riverside (Alternative Education) Program for Career Kickstart
- \$30,000 to CAP Services, Stevens Point, WI, in 2012. For skills enhancement program
- \$25,000 to Tri-County Community Dental Clinic, Appleton, WI, in 2012. For Dental Bus
- \$5,230 to Christine Ann Domestic Abuse Services, Neenah, WI, in 2012. For crisis advocacy services
- \$5,000 to Jazz Corner Society, Menasha, WI, in 2012. For Fox Jazz Festival
- \$4,000 to Fox River Industries, Berlin, WI, in 2012. For Green Lake Thrift Store
- \$3,500 to Clarity Care, Oshkosh, WI, in 2012. For Help at Home Program
- \$1,200 to Oshkosh Family Inc, Oshkosh, WI, in 2012. For Meals on Wheels
- \$750 to Green Lake Association, Green Lake, WI, in 2012. For Green Team Outings

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# The 1994 Charles B. Degenstein Foundation

**Last Updated:** 2014-08-22

## At A Glance

P.O. Box 185  
Pittsburgh, PA United States 15230-0185  
URL: [www.deg-fdn.org](http://www.deg-fdn.org)

## Type of Grantmaker

Independent foundation

## Financial Data

(yr. ended 2013-06-30)  
Assets: \$86,045,552  
Total giving: \$4,852,711

## EIN

237792979

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Application address: 43 S. 5th St., Sunbury, PA 17801-2896, tel.: (570) 286-1582

## Background

Established in 1996 in PA.

## Limitations

Giving within a 75-mile radius of Sunbury, PA.

No support for religious or political activities.

No grants to individuals, or for scholarships, annual campaigns, endowment funds, operating budgets, emergency needs, or

mass mailings; no loans.

## **Purpose and Activities**

Special consideration is given to unique, innovative, and creative projects that benefit children, promote education, improve health care, encourage business, culture, conservation of nature resources, and protection of the environment.

## **Fields of Interest**

### **Subjects**

- Arts
- Children, services
- Christian agencies & churches
- Community/economic development
- Disasters, fire prevention/control
- Education
- Health care
- Human services
- Libraries (public)
- United Ways and Federated Giving Programs
- YM/YWCAs & YM/YWHAs

## **Geographic Focus**

- Pennsylvania

## **Types of Support**

- Capital campaigns
- Equipment
- Matching/challenge support
- Program development

## **Publications**

- Application guidelines

## **Application Information**

Application form pages must be stapled with one staple in the upper left corner. Do not use notebooks, folders, or bind pages together. All information submitted to the foundation shall be on recycled paper and stapled with ease of recycling in mind. Videos, cassettes, or applications submitted by fax or e-mail are not accepted. See instructions on application form for exact number of copies which need to be submitted.

Application form required.

Applicants should submit the following:

1. Signature and title of chief executive officer
2. Copy of IRS Determination Letter
3. Copy of most recent annual report/audited financial statement/990

Initial approach: 1-page cover letter along with 2-page application form which can be found on foundation web site

Deadline(s): None

Additional information: Only 1-copy of the applicant's annual report, financial statement and IRS letter are required. Also, a separate 1-page, line item budget identifying the projected income and expense of the organization and the program is required. The foundation asks that the applicant not send any document from Department of Revenue for Pennsylvania. A sales tax exempt notice or state corporation certificate is insufficient.

## **Trustee**

- BNY Mellon, N.A.

## **Financial Data**

Year ended 2013-06-30

Assets: \$86,045,552 (market value)

Expenditures: \$6,189,601

Total giving: \$4,852,711

Qualifying distributions: \$5,310,578

Giving activities include:

\$4,852,711 for 128 grants (high: \$1,000,000; low: \$500)

## **Additional Location Information**

County: Allegheny  
Metropolitan area: Pittsburgh, PA  
Congressional district: Pennsylvania District 14

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## MDRC

**Last Updated:** 2009-10-15

### At A Glance

(formerly Manpower Demonstration Research Corporation)  
16 E. 34th St.  
New York, NY United States 10016-4326  
Telephone: (212) 532-3200  
Fax: (212) 684-0832  
E-mail: [information@mdrc.org](mailto:information@mdrc.org)  
URL: [www.mdrc.org](http://www.mdrc.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### Financial Data

(yr. ended 2011-12-31)  
Assets: \$85,982,863  
Total giving: \$2,971,018

### EIN

237379473

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Background

Established in 1974.

### Limitations

Giving on a national basis.

### Purpose and Activities

The organization is dedicated to learning what works to improve the well-being of low-income people, including promoting family well-being and child development, improving public education, promoting successful transitions to adulthood, supporting low-wage workers and communities, and overcoming barriers to employment.

### Fields of Interest

#### Subjects

- Children/youth, services
- Education, early childhood education
- Employment
- Employment, services
- Family services
- Housing/shelter

#### Population Groups

- Children/youth
- Economically disadvantaged

### Geographic Focus

- National

### Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert Solow \*, Chair.  
Affiliation(s):  
*Massachusetts Institute of Technology, Prof.*
- Gordon Berlin, Pres.
- Jesus M. Amadeo, Sr. V.P., Core Dept.
- Robert J. Ivry, Sr. V.P., Devel. and Ext. Affairs
- Fred Doolittle, V.P.
- Barbara S. Goldman, V.P.
- Sharon Rowser, V.P.
- John W. Wallace, V.P., Devel. and Ext. Affairs
- Rudolph G. Penner \*, Treas.  
Affiliation(s):  
*Urban Institute, Sr. Fellow*
- Mary Jo Bane  
Affiliation(s):  
*Harvard University, Prof., Public Policy, John F. Kennedy School of Govt.*
- Rebecca M. Blank  
Affiliation(s):  
*Brookings Institution, Robert V. Kerr Sr. Fellow*
- Ron Haskins  
Affiliation(s):  
*Brookings Institution, Sr. Fellow, Economic Studies*
- James H. Johnson, Jr.  
Affiliation(s):  
*University of North Carolina, William Rand Kenan Jr. Distinguished Prof. of Mgmt., Sociology, and Public Policy and Dir., Urban Investment Strategies Ctr.*
- Richard J. Murnane  
Affiliation(s):  
*Harvard University, Prof., Education, Graduate School of Education*
- Jan Nicholson  
Affiliation(s):  
*The Grable Foundation, Pres.*
- Charles M. Payne  
Affiliation(s):  
*University of Chicago, Frank P. Hixon Distinguished Service Prof., School of Social Svc. Admin.*
- John S. Reed
- Susan Sandler  
Affiliation(s):  
*Sandler Foundation, Member*
- Isabel V. Sawhill  
Affiliation(s):  
*Brookings Institution, Sr. Fellow, Economic Studies and Co-Dir., Ctr. on Children and Families*
- William Julius Wilson  
Affiliation(s):  
*Harvard University, Lewis P. and Linda L. Geyser University Prof., John F. Kennedy School of Govt.*

## Financial Data

Year ended 2011-12-31

Assets: \$85,982,863 (market value)

Gifts received: \$50,271,251

Expenditures: \$55,695,488

Total giving: \$2,971,018

Qualifying distributions: N/A

Giving activities include:

\$2,971,018 for grants

## Additional Location Information

County: New York

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New York District 12

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# New Hampshire Community Loan Fund

Last Updated: 2013-08-07

## At A Glance

7 Wall St.  
Concord, NH United States 03301-3741  
Telephone: (603) 224-6669  
Contact: Juliana Eades, Pres.  
Fax: (603) 225-7425  
E-mail: [info@communityloanfund.org](mailto:info@communityloanfund.org)  
URL: [www.nhclf.org](http://www.nhclf.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2012-06-30)  
Assets: \$83,468,454  
Total giving: \$1,757,352

## EIN

222524015

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Toll Free Tel. : (800)-432-4110

## Background

Established in 1983 in NH.

## Limitations

Giving primarily in NH.

## Purpose and Activities

The mission of the fund is to serve as a catalyst, leveraging financial, human, and civic resources to enable traditionally underserved people to participate more fully in New Hampshire's economy.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Child Care Lending Initiative

This program works to retain existing child care spaces and develop new ones in New Hampshire communities by lending funds and providing training and technical support to nonprofit child care centers and family-based child care providers within the state. The program provides child care centers with technical assistance and loans for purchase, renovations, leasehold improvements, and other safety and/or licensing improvements.

### Community Housing Program

This program is designed to expand the supply of affordable housing in New Hampshire, and keep them permanently affordable, by making loans and technical assistance available to nonprofit housing development organizations throughout the state. The program provides pre-development financing to 'core' borrowers, short-term financing to acquire building sites, 'gap' financing at critical junctures in a project's evolution, and longer-term financing for special projects that are unable to secure appropriate conventional financing. Applicants must demonstrate that their project helps people with low and moderate incomes (per standards set by the Department of Housing and Urban Development), has a long-term benefit to people with low and moderate incomes, has a demonstrated source of income to repay the loan to the fund, has community support, and attracts other resources to the effort.

### Cooperative Home Loan Program

This program provides reasonably-priced fixed-rate loans to individuals in resident-owned communities, including first-time home buyer loans through New Hampshire Housing Finance Authority, refinance/home equity loans, and purchase loans for existing homes. Eligible homes must be located in a resident-owned park and be owner-occupied; eligible borrowers must have the ability to repay loans and have a satisfactory credit history.

## Individual Development Accounts

The fund offers individual development accounts (IDAs) to low- and moderate-income people, to help them become homeowners, small-business owners, and graduates of post-secondary education programs. Savings deposits by participants are matched by donated funds from charitable organizations at a rate of 3:1, up to \$2,000. Eligible individuals are required to develop savings goals/plans, access economic literacy training/education, and plan for asset management.

## Nonprofit Facilities Lending

This program works to help nonprofit organizations better serve their communities (especially those with lower incomes) with essential services such as childcare, soup kitchens, mental health services, legal services, etc. The fund can lend funds to help a nonprofit organization buy a property to reduce overhead or expand services to better meet its mission.

## Fields of Interest

### Subjects

- Community/economic development
- Housing/shelter, expense aid
- Housing/shelter, services
- Philanthropy/voluntarism

### Population Groups

- Economically disadvantaged

## Geographic Focus

- New Hampshire

## Types of Support

- Program-related investments/loans

## Publications

- Application guidelines
- Annual report
- Informational brochure
- Newsletter

## Application Information

Application form required.

Initial approach: Telephone or e-mail

Board meeting date(s): Monthly

Deadline(s): None

Final notification: Within 1 to 2 months after receipt of loan application

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Paula Rogers \*, Chair.  
Affiliation(s):  
*Anthem Blue Cross and Blue Shield of NH, Dir.*
- Juliana Eades \*, Pres.
- Lois Parris \*, Secy.  
Affiliation(s):  
*Lakes Region MHP Cooperative, Pres.*
- Ray Giroux \*, Vice-Secy.  
Affiliation(s):  
*Oracle Corporation, Member*
- Deborah Butler \*, Vice-Treas.  
Affiliation(s):  
*Sulloway & Hollis, PLLC, Member*
- Randy Roody \*, Vice-Treas.
- Christina Hill
- Laura Jamison  
Affiliation(s):  
*L. Jamison GAL LLC, Member*
- Edward Tomey



Affiliation(s):  
*Antioch University, Prof. Emeritus of Management*

- Sara Valera

## Memberships

### Affinity Groups

- Council on Fundraising
- National Children's Facilities Network
- The Forum for Sustainable and Responsible Investment (US SIF)

### Associations and Other Philanthropic Organizations

- New Hampshire Center for Nonprofits

## Financial Data

Year ended 2012-06-30

Assets: \$83,468,454 (market value)

Gifts received: \$4,203,462

Expenditures: \$9,876,418

Total giving: \$1,757,352

Qualifying distributions: N/A

Giving activities include:

\$1,394,137 for 18 grants (high: \$669,571; low: \$5,000)

\$363,215 for grants to individuals

## Online Communications

- [LinkedIn](#)
- [YouTube](#)
- [Facebook](#)
- [RSS Feed](#)

## Additional Location Information

County: Merrimack

Congressional district: New Hampshire District 02

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## Sunflower Foundation: Health Care for Kansans

**Last Updated:** 2013-01-10

### At A Glance

1200 S.W. Executive Dr., Ste. 100

Topeka, KS United States 66615-3854

Telephone: (785) 232-3000

Contact: Billie G. Hall, Pres. and C.E.O.

Fax: (785) 232-3168

E-mail: [info@sunflowerfoundation.org](mailto:info@sunflowerfoundation.org)

URL: [www.sunflowerfoundation.org](http://www.sunflowerfoundation.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Health conversion foundation
- Supporting organization

## Financial Data

(yr. ended 2012-06-30)

Assets: \$83,414,615

Total giving: \$2,597,419

## EIN

481241590

**990**

## **Additional Contact Information**

Toll-free tel.: (866) 232-3020

## **Background**

Established in 2000 in KS; supporting organization of the State of Kansas.

Created through a settlement between Blue Cross Blue Shield of Kansas, Attorney General, and Insurance Commissioner.

## **Limitations**

Giving limited to KS.

No support for political purposes.

No grants for ongoing general operating expenses, endowments, capital or fundraising campaigns, individual medical care, or medical equipment.

## **Purpose and Activities**

The foundation assists the state of Kansas in meeting the health care needs of its citizens, particularly those unserved or underserved by the current system.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Bridge Grants**

Up to \$200,000 is available to provide core transitional financial support for new or expanded medical, mental, dental, and/or public health practitioners. Targeted applicants include "safety net" clinics and community health centers/clinics providing primary care and primary prevention services to the uninsured or underinsured. Eligible applicants are required to provide dollar-for-dollar matching funds.

### **Capacity Building Grants**

Funding of up to \$20,000 is available for health and human services nonprofits towards building their capacity to provide primary care or primary prevention services to the uninsured or underinsured. Other health-related nonprofit organizations will be considered for this grant on a case-by-case basis. Eligible organizations are required to match at least 10 percent of the amount requested.

### **Finding Solutions in Challenging Times**

The foundation recognizes the 'tough times' facing nonprofit health and human service organizations as they work to meet increasing needs among Kansans. In response, the foundation will offer support to organizations that are providing critical services to those in need. Eligible applicants must be nonprofit health and/or human service organizations serving Kansans and with 501(c)(3) status. Priority will be given to organizations with missions to provide services to low-income, uninsured populations, and those with special needs (including mental health, food security, social/counseling services, and family and child welfare). Grants will range from \$20,000 to \$50,000; depending on the funding requested and the needs of the applicant organization, a cash match may be required.

### **Sunflower Trail Grants**

Grants of up to \$55,000 are available for projects to build new or expand existing recreational trails that increase opportunities for physical activity for Kansans of all ages. Public access to the trail is required, though hours may be restricted for user safety. Preference will be given to trails on public property. Eligible organizations are required to provide dollar-for-dollar matching funds. Grant funds cannot be used for traditional city or neighborhood sidewalks, trail amenities (exercise stations, playground equipment, benches, gazebos, and general landscaping), and trails that prohibit public access and/or use.

## **Fields of Interest**

### **Subjects**

- Dental care
- Health care
- Health care, clinics/centers
- Public health
- Public health, physical fitness

### **Geographic Focus**

- Kansas

### **Types of Support**

- Management development/capacity building
- Program development

## **Publications**

- Application guidelines
- Annual report
- Grants list
- Newsletter

## Application Information

Application form required.

Initial approach: Submit electronic application

Copies of proposal: 5

Board meeting date(s): 2nd Thurs. of even-numbered months

Deadline(s): Feb. 25, Apr. 29, July 1, Sept. 2, and Oct. 28 for Bridge Grants, Capacity Building Grants, and Walking Trails Grants; June 1, July 28, and Sept. 22 for Finding Solutions in Challenging Times

Final notification: Within 90 days of submission of application

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Chris Ruder \*, Chair.  
Affiliation(s):  
*University of Kansas Hospital, V.P., Patient Care Svcs.*
- Billie G. Hall, Pres. and C.E.O.
- Larry W. Tobias, V.P., Progs.
- Mia Korbelik \*, Secy.
- Kraig L. Gross \*, Treas.  
Affiliation(s):  
*Kansas Natural Gas, Inc., Controller*
- Marty Beezley
- Karen S. Hauser, Ed.D.  
Affiliation(s):  
*Catholic Charities of Salina, C.E.O.*
- Reggie Robinson  
Affiliation(s):  
*Kansas Board of Regents, Pres. and C.E.O.*
- Howard Shuler
- Greg Unruh  
Affiliation(s):  
*Community HealthCare System, Inc., Pres. and C.E.O.*
- Caroline A. Williams  
Affiliation(s):  
*Westar Energy, V.P.*

## Memberships

### Affinity Groups

- Grantmakers for Effective Organizations
- Grantmakers In Health

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-06-30

Assets: \$83,414,615 (market value)

Gifts received: \$7,500

Expenditures: \$4,423,259

Total giving: \$2,597,419

Qualifying distributions: N/A

Giving activities include:

\$2,597,419 for grants

## Online Communications

- [Grants Database](#)

## Additional Location Information

County: Shawnee  
Metropolitan area: Topeka, KS  
Congressional district: Kansas District 02

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## Tides Center

**Last Updated:** 2013-01-07

### At A Glance

P.O. Box 29907  
San Francisco, CA United States 94129-0907  
Telephone: (415) 561-6300  
Contact: Jane Levikow, Dir., External Relations  
Fax: (415) 561-6301  
E-mail: [info@tides.org](mailto:info@tides.org)  
URL: [www.tidescenter.org](http://www.tidescenter.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Fiscal sponsor
- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### Financial Data

(yr. ended 2011-12-31)  
Assets: \$82,300,644  
Total giving: \$19,341,827

### EIN

943213100

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

Additional contact inf. to become a project: tel.: (415) 561-7830, E-mail: [newprojects@tides.org](mailto:newprojects@tides.org)

### Background

Established in 1994 in CA.

### Purpose and Activities

The center actively promotes change towards a healthy society, one which is founded on principles of social justice, broadly-shared economic opportunity, a robust democratic process, and sustainable environmental practices.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Fiscal Sponsorship Program

The center provides a legal home and a comprehensive infrastructure that helps reduce the complexity of operating a successful nonprofit project. Through this program, the center enables projects to stay focused on their mission and fundraising without compromising on the expertise needed to run day-to-day operations.

#### Union Square Awards

This program provides funding to support innovative grassroots organizations responding to New York City's most pressing social issues and making vital contributions through their efforts to the educational, economic, and cultural life of the city. Awards of up to \$50,000 are intended to be given to small organizations that have not yet received substantial funding or recognition. Separate awards of up to \$35,000 will be given to innovative and creative New York City-based arts programs that engage youth and families in low-income communities across the city.

### Fields of Interest

#### Subjects

- Community/economic development
- Economic development

- Environment
- Environment, administration/regulation
- Human services
- International affairs
- Philanthropy/voluntarism

## Types of Support

- Continuing support
- In-kind gifts
- Program development
- Program evaluation

## Publications

- Application guidelines
- Annual report
- Informational brochure

## Application Information

Application form not required.

Initial approach: Submit nomination form for Union Square Awards

Deadline(s): None for Union Square Awards

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Stephanie J. Clohesy \*, Chair.
- Lawrence Litvak \*, Vice-Chair.
- Melissa Bradley \*, C.E.O.
- Ellen Friedman \*, Exec. V.P.

Affiliation(s):

*3 Guineas Fund, Dir.*

*Presidio Hill School, Dir.*

*Family Violence Prevention Fund, Dir.*

*Tides Foundation, Exec. V.P.*

- Kim Sarnecki \*, Secy.
- Lori Eason \*, Treas.
- Noa Emmett Aluli

Affiliation(s):

*Kaho'olawe Island Reserve Commission, Chair.*

- Dan Carol

Affiliation(s):

*The Apollo Alliance, Co-Founder*

- Vikki Spruill

## Staff

### Number of Staff

52 full-time professional

46 shared staff (shared with Tides Foundation)

### Key Staff

*Note: Does not include officers.*

- Farnaz Golshani, Dir., Progs. and Svcs.
- Jane Levikow, Dir., External Rels.

## Memberships

### Affinity Groups

- Alliance for Justice

## Financial Data

Year ended 2011-12-31

Assets: \$82,300,644 (market value)

Gifts received: \$94,079,671

Expenditures: \$99,076,893

Total giving: \$19,341,827

Qualifying distributions: N/A  
Giving activities include:  
\$19,241,574 for grants  
\$90,838 for grants to individuals

### **Additional Location Information**

County: San Francisco  
Metropolitan area: San Francisco-Oakland-Fremont, CA  
Congressional district: California District 12

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## **Rancho Santa Fe Foundation**

**Last Updated:** 2014-08-19

### **At A Glance**

(formerly Rancho Santa Fe Community Foundation)  
162 S. Rancho Santa Fe Rd., Ste. B-30  
Encinitas, CA United States 92024  
Telephone: (858) 756-6557  
Contact: Christina Wilson, Exec. Dir.; For grants: Debbie Anderson, Progs. Mgr.  
Fax: (858) 756-6561  
E-mail: [info@rsffoundation.org](mailto:info@rsffoundation.org)  
URL: [www.rsffoundation.org](http://www.rsffoundation.org)

### **Type of Grantmaker**

Community foundation

### **Financial Data**

(yr. ended 2013-12-31)  
Assets: \$82,134,300  
Total giving: \$3,507,800

### **EIN**

953709639

### **990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### **Additional Contact Information**

Mailing address: P.O. Box 811, Rancho Santa Fe, CA 92067

### **Background**

Established in 1981 in CA.

### **Limitations**

Giving primarily in San Diego County, CA.  
No support for religious organizations (from discretionary funds).  
No grants for capital campaigns, annual campaigns, or endowments (from discretionary funds).

### **Purpose and Activities**

The foundation seeks to connect donors with regional and global needs through visionary community leadership, personalized service and effective grantmaking.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Armed Forces Interest Group**

Competitive grant program focused on qualified nonprofit organizations whose mission/services support the needs of active duty military, their families and veterans.

#### **Impact Grants Program**

Funded solely by donors who have contributed to the foundation's unrestricted endowments. Each year a specific focus is selected by the Board of Directors for the Impact grants program. The process is competitive and grants are awarded to qualified nonprofit organizations throughout San Diego County. Applications for Impact Grants will be solicited annually in the

Fall. The foundation makes grants within and across: 1) Arts and Culture; 2) Education; 3) Health and Human Services; and 4) Community Enhancement.

## Fields of Interest

### Subjects

- Arts
- Community/economic development
- Education
- Health care
- Human services

## Geographic Focus

- California

## Types of Support

- Building/renovation
- Continuing support
- Curriculum development
- Emergency funds
- Equipment
- General/operating support
- Grants to individuals
- Land acquisition
- Management development/capacity building
- Program development
- Publication
- Scholarship funds
- Seed money
- Technical assistance

## Publications

- Annual report
- Financial statement
- Informational brochure
- Newsletter

## Application Information

Visit foundation website for application timeline and information.

Application form required.

Initial approach: Contact foundation

Board meeting date(s): Bimonthly

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Neil C. Hokanson \*, Chair.  
Affiliation(s):  
*Hokanson Associates, Pres.*
- Gigi Fenley \*, Secy.
- William J. Ruh \*, Treas.  
Affiliation(s):  
*Aequitas Capital, Managing Prin. and Exec. V.P.*
- Christina P. Wilson, Exec. Dir.
- Alyce Ashcraft  
Affiliation(s):  
*Ashcraft Investment Company, V.P.*
- Terry Atkinson  
Affiliation(s):  
*Atkinson Management Consulting, Member*
- Richard Collato
- Craig Dado  
Affiliation(s):  
*Del Mar Thoroughbred Club, Sr. V.P., Mktg.*
- William Davidson

Affiliation(s):  
*Qualcomm Investor Relations, Sr. V.P.*

- David Down  
Affiliation(s):  
*KPMG, LLP San Diego, Managing Dir.*
- Franci Free
- Hugh Greenway, M.D.  
Affiliation(s):  
*Mohs Surgery/Dermatology Surgery Scripps Clinic, Pres.*
- Victoria Hanlon
- Mark Holmlund
- Candace A. Humber
- Kimberly Davis King  
Affiliation(s):  
*Hercules Technology Growth Capital, Member*
- Constance Levi
- Dr. Michael Lobatz  
Affiliation(s):  
*Scripps Memorial Hospital Encinitas, C.M.O.*
- John Major  
Affiliation(s):  
*MTSG, Pres.*
- Ronald D. McMahon  
Affiliation(s):  
*McMahon Development Group, C.O.O.*
- Glenn Oratz  
Affiliation(s):  
*UBS, Managing Dir.*
- Daniel Platt  
Affiliation(s):  
*Pacific Western Bank, Exec. V.P., Special Assets Group*
- Paula Powers
- Richard Sapp
- Steve Simpson  
Affiliation(s):  
*Gurtin Fixed Income Management, Pres. and Managing Partner*
- Gordon Swanson  
Affiliation(s):  
*Cran Chile, C.E.O. and Investor*
- paul Thiel  
Affiliation(s):  
*BNY Mellon, Business Devel. Exec.*
- Robert Vanosky
- Donna Walker  
Affiliation(s):  
*Pulido Walker Foundation, Pres.*
- Philip White
- Betty Williams
- Kate Williams

## **Staff**

### **Number of Staff**

1 full-time professional  
3 part-time professional

### **Key Staff**

*Note: Does not include officers.*

- Debbie Andersen, Progs. Mgr.
- Dan Beals, Finance Mgr.
- Nancy Hashim, RSF Women's Fund
- Sue Pyke, Donor Svcs. Dir.

## **Memberships**



## Regional Associations of Grantmakers

- San Diego Grantmakers

## Associations and Other Philanthropic Organizations

- Council on Foundations
- GuideStar USA

## Financial Data

Year ended 2013-12-31

Assets: \$82,134,300 (market value)

Gifts received: \$16,116,400

Expenditures: \$4,225,300

Total giving: \$3,507,800

Qualifying distributions: \$3,507,800

Giving activities include:

\$3,507,800 for grants

## Online Communications

- [LinkedIn](#)
- [E-Newsletter](#)
- [Facebook](#)
- [Twitter](#)

## Additional Location Information

County: San Diego

Metropolitan area: San Diego-Carlsbad-San Marcos, CA

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# Joseph Drown Foundation

**Last Updated:** 2014-04-18

## At A Glance

1999 Ave. of the Stars, Ste. 2330

Los Angeles, CA United States 90067-6043

Telephone: (310) 277-4488

Contact: Wendy Wachtell, Pres.

Fax: (310) 277-4573

E-mail: [staff@jdrown.org](mailto:staff@jdrown.org)

URL: [www.jdrown.org](http://www.jdrown.org)

## Type of Grantmaker

Independent foundation

## Financial Data

(yr. ended 2013-03-31)

Assets: \$82,126,910

Total giving: \$3,988,260

## EIN

956093178

## 990

[2013](#) [2012](#) [2011](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

## Background

Established in 1953 in CA.

Joseph Drown, whose life spanned the period of 1906 to 1982, was active in the hotel industry from his early 20's until the end of his career. He started as an employee, then in management and subsequently ownership. His prize ownership, which he personally developed in 1945, was the Hotel Bel-Air in Los Angeles. He also employed his business skills in the acquisition and operation of numerous other businesses and properties. The foundation was formed to provide an organized means for its founder to make charitable gifts during his lifetime and to have the foundation continue making grants upon his death.

## Limitations

Giving primarily in Los Angeles County, CA.

No support for religious purposes.

No grants to individuals, or for endowments, multi-year grants, capital campaigns, building funds, tickets for fundraising events, seminars or conferences.

## **Purpose and Activities**

Education is the primary focus of the foundation, and it supports education programs in K-12, at both public and private schools, that seek to solve the existing problems in Los Angeles, CA, area schools. Grants for education reform can be made directly to the schools or to independent organizations which are closely involved with this issue. In addition, the foundation provides funds to private secondary schools, colleges and universities for student financial assistance, in the form of both scholarships and loan programs. Favor is given to programs directed at talented middle income students who are unable to obtain assistance from sources specifically available to low income students. Committed to improving the quality of life in the local community, the foundation supports programs that encourage all individuals to reach their fullest potential. The foundation believes that the best chance a young person has to reach that goal is to stay in school, inside a functioning family, and outside the juvenile justice system. To that end, the foundation supports programs that deal with issues such as the high drop-out rate, lack of sufficient health care, substance abuse and violence. In addition, the foundation will consider programs that address poverty issues and assist the economically disadvantaged. Programs aimed at solutions to or the prevention of these problems are favored. Although it is not the emphasis of the foundation, grants are made for the arts and humanities and are made primarily for outreach and education programs. The foundation also makes grants for medical and scientific research, but these are initiated by the foundation.

## **Fields of Interest**

### **Subjects**

- Arts
- Crime/violence prevention, abuse prevention
- Education
- Education, early childhood education
- Elementary school/education
- Health care
- Human services
- Humanities
- Medical research, institute
- Substance abuse, services

### **Population Groups**

- Economically disadvantaged

## **Geographic Focus**

- California

## **Types of Support**

- General/operating support
- Matching/challenge support
- Program development
- Scholarship funds
- Seed money

## **Publications**

- Application guidelines
- Grants list
- Informational brochure (including application guidelines)

## **Application Information**

Unsolicited applications are not accepted for medical and scientific research. Please do not send videos or materials that need to be returned.

Application form not required.

Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Brief history of organization and description of its mission
3. Copy of most recent annual report/audited financial statement/990
4. Listing of board of directors, trustees, officers and other key people and their affiliations
5. Detailed description of project and amount of funding requested
6. Copy of current year's organizational budget and/or project budget

## 7. Additional materials/documentation

Initial approach: Proposal and letter

Copies of proposal: 1

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): Jan. 15, Apr. 15, July 15, and Oct. 15

Final notification: Immediately after board meeting

Additional information: If applying for a particular program, a statement of the objectives for that program should be included. New organizations that do not yet have audited financial statements or a Form 990 may send unaudited information.

### Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Joseph W. Drown‡

### Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Norman C. Obrow \*, Chair.
- Wendy Wachtell \*, Pres.  
Affiliation(s):  
*USC Center on Philanthropy and Public Policy, Advisory Board Member*  
*John Thomas Dye School, Board Member*  
*Harvard Westlake School, Board Member*
- Elaine Mahoney \*, V.P.
- Thomas C. Marshall \*, V.P.
- Philip S. Magaram \*, Secy.-Treas.
- Ann T. Miller, C.F.O.

### Staff

#### Number of Staff

3 full-time professional

1 full-time support

#### Key Staff

*Note: Does not include officers.*

- Alyssa Eichelberger, Prog. Admin.

### Memberships

#### Regional Associations of Grantmakers

- Southern California Grantmakers

#### Associations and Other Philanthropic Organizations

- Council on Foundations

### Financial Data

Year ended 2013-03-31

Assets: \$82,126,910 (market value)

Expenditures: \$5,473,044

Total giving: \$3,988,260

Qualifying distributions: \$4,474,153

Giving activities include:

\$3,988,260 for 124 grants (high: \$200,000; low: \$5,000)

### Additional Location Information

County: Los Angeles

Metropolitan area: Los Angeles-Long Beach-Santa Ana, CA

Congressional district: California District 37

### Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$100,000 to California State University at Northridge Foundation, Northridge, CA, in 2012.
- \$100,000 to International Medical Corps, Santa Monica, CA, in 2012.

- \$75,000 to Harvard-Westlake School, North Hollywood, CA, in 2012.
- \$70,000 to University of Iowa Foundation, Iowa City, IA, in 2012.
- \$50,000 to Operation Rainbow, Oakland, CA, in 2012.
- \$35,000 to Museum Associates, Los Angeles, CA, in 2012.
- \$25,000 to University of California, San Francisco, CA, in 2012.
- \$25,000 to Childrens Burn Foundation, Sherman Oaks, CA, in 2012.
- \$25,000 to Family Unity International, Elm Grove, WI, in 2012.
- \$15,000 to Inner-City Filmmakers, Santa Monica, CA, in 2012.

## The Raymond John Wean Foundation

**Last Updated:** 2014-07-15

### At A Glance

147 W. Market St.  
Warren, OH United States 44481-1022  
Telephone: (330) 394-5600  
Contact: Jennifer Roller, Pres.  
Fax: (330) 394-5601  
E-mail: [info@rjweanfdn.org](mailto:info@rjweanfdn.org)  
URL: [www.rjweanfdn.org](http://www.rjweanfdn.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

### Financial Data

(yr. ended 2013-12-31)  
Assets: \$80,350,284  
Total giving: \$2,227,560

### EIN

346505038

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Established in 1949 in OH.

Since 1949, the foundation has made over \$90 million in grants to a broad variety of nonprofit organizations. Over the years, it has evolved from a small, board-managed organization with informal grant making procedures to a strategic and proactive professionally-staffed foundation. Inventive and enterprising industrialist Raymond John Wean established the foundation in Warren, Ohio in 1949. Having achieved success in the flat rolled steel processing industry, Wean created a foundation that would serve the communities in which he had achieved his success. Through the years, the Wean family remained highly engaged with the foundation's board. Jack Wean served as acting chairman of the foundation until the time of his death in 1980. His wife, Sara R. Wean, continued his legacy and served on the board until her death in 1986. Jack and Sara's son, Raymond John Wean, Jr., continued the family's mission. As an original board member of the foundation since its creation in 1949, he served as chairman until his death in 2006. Today, Gordon B. Wean, a third generation member of the Wean family, serves as chairman of the foundation. More recently, new initiatives and a tailored focus have shifted the foundation's processes and grant making during the years. In February 2006, the foundation hired PolicyLink to assist with refining the foundation's strategic focus. PolicyLink is a national research and action institute that works collaboratively to develop and implement local, state, and federal policies to achieve economic and social equity. Over nine months of interviews and visits, PolicyLink produced a report, "A Community Building Philanthropic Initiative to Strengthen the Mahoning Valley." The report presented recommendations to the foundation on the focus, approach, and structure of a philanthropic initiative that will support the equitable renewal of the Mahoning Valley and expand economic and social opportunities for its residents. The foundation is in the process of implementing the report. The foundation annually grants approximately \$4 million. Those funds were earmarked for nonprofits in Mahoning and Trumbull Counties. Through these efforts, the foundation continues to enhance the community's well-being and vitality through grant making, convening, advocating, and providing leadership. The grantmaker is a signatory to Philanthropy's Promise, an initiative of the National Committee for Responsive Philanthropy (NCRP). By signing on, the grantmaker has committed to allocating the majority of its grantmaking dollars to marginalized communities and at least 25 percent to social justice strategies, such as advocacy, community organizing, and civic engagement.

## **Limitations**

Giving limited to the Mahoning and/or Trumbull Counties in OH.

No support for sectarian religious activities, veterans' or fraternal organizations, or local or national offices of organizations combating a particular disease or family of diseases.

No grants to individuals; or for endowment funds, debt reduction, foreign operations, national fundraising campaigns or film or video production.

## **Purpose and Activities**

To enhance community well-being and vitality in the Mahoning Valley through strategic grant making intended to support people living in the Valley's economically disadvantaged communities and neighborhoods in adherence to the following principles: to explore new innovative approaches to addressing issues, to seek inclusion and broad community involvement; to build on the considerable assets of the Mahoning Valley; to strive for equity and support social justice; to leverage additional resources, partners and ideas; to support the development of human assets and capital; to cultivate leadership in the community; and to provide support to people and communities which are often overlooked or insufficiently funded.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Early Childhood Development**

Funds projects selected to: 1) improve the quality of child care available to parents of preschool children; 2) assure that young children and their families have access to quality health care; 3) assist and educate parents in their efforts to strengthen their families; and 4) provide a stable, healthy, vibrant and progressive environment for young children and their families by developing their neighborhoods and communities. Concentration on organizations working to affect systemic change in improving the quality of early care and education for children under five. See foundation web site for current status of this program.

### **Neighborhood Success Grants Program**

This program will offer grants which may be used for a wide array of resident-driven community projects. Grants awarded are intended to build on the assets and resources of the neighborhoods. The aim is to stimulate the development of creative ideas which effectively address the most important concerns of neighborhood by developing community leadership and organizational capacity; stimulating the development of resident-driven projects which address neighborhood concerns; provide forums for groups to connect and collaborate, and increase opportunities for positive community involvement. Grants will be awarded in amounts ranging between \$500 and \$5000 to those groups with the most promising ideas for improving their neighborhoods. Grant seekers are required to match the amount they are seeking with contributions of volunteer labor (for the purpose of this program, the value of volunteer labor is \$12 per person, per hour), cash, or in-kind donations of goods and services. See foundation web site for this program's current status.

## **Fields of Interest**

### **Subjects**

- Child development, services
- Community/economic development
- Education, early childhood education

### **Geographic Focus**

- Ohio

### **Types of Support**

- Income development
- Management development/capacity building
- Program development
- Program evaluation
- Program-related investments/loans
- Technical assistance

### **Publications**

- Application guidelines
- Annual report
- Financial statement
- Grants list

## **Application Information**

Applications accepted only after letter of inquiry. Letter of inquiry form is available of foundation's web site. The foundation also accepts the Ohio Grantmakers Forum's letter of inquiry, application and final evaluation forms.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Results expected from proposed grant
3. Qualifications of key personnel
4. Population served
5. Copy of IRS Determination Letter
6. Brief history of organization and description of its mission
7. Copy of most recent annual report/audited financial statement/990
8. Listing of board of directors, trustees, officers and other key people and their affiliations
9. Detailed description of project and amount of funding requested
10. Copy of current year's organizational budget and/or project budget

Initial approach: Complete letter of inquiry form

Copies of proposal: 2

Board meeting date(s): Mar., Jun., Sept. and Dec.

Deadline(s): See foundation web site for current deadlines

Final notification: Following board meeting

## **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Raymond John Wean, Sr.‡

## **Officers and Administrators**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Gordon B. Wean \*, Chair.
  - Jennifer Roller, Pres.
  - Germaine Bennett
  - Don Emerson
  - Suzanne Fleming
  - Paul Hagman
  - Pastor Michael Harrison
  - William Mullane
  - John L. Pogue
- Affiliation(s):  
*Harrington, Hoppe &  
Mitchell, LTD, Partner*
- Janis Sanfrey

## **Trustee**

- The Glenmede Trust Company

## **Staff**

### **Number of Staff**

4 full-time professional

1 full-time support

### **Key Staff**

*Note: Does not include officers.*

- Corrie Adams, Prog. Assoc., Neighborhood SUCCESS
- Cheryl R. Crooks, Exec. Asst. to Pres.
- Pamela Perrino, Advocate, Early Childhood
- Jennifer E. Roller, Prog. Off., Urban Affairs and Neighborhoods
- Lori A. Wiebe, Office Mgr.

## **Memberships**

### **Regional Associations of Grantmakers**

- Philanthropy Ohio

### **Affinity Groups**

- Exponent Philanthropy
- Grantmakers for Effective Organizations
- Grassroots Grantmakers

- Neighborhood Funders Group

## Financial Data

Year ended 2013-12-31

Assets: \$80,350,284 (market value)

Gifts received: \$10,000

Expenditures: \$3,858,666

Total giving: \$2,227,560

Qualifying distributions: \$3,257,142

Giving activities include:

\$2,227,560 for 174 grants (high: \$425,000; low: \$500)

## Online Communications

- [The Raymond John Wean Foundation's Philanthropy Promise](#)
- [E-Newsletter](#)

## Additional Location Information

County: Trumbull

Metropolitan area: Youngstown-Warren-Boardman, OH-PA

Congressional district: Ohio District 13

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$650,000 to Junior Achievement of Mahoning Valley, Girard, OH, in 2010. For Children Development Accounts
- \$575,000 to D and E Counseling Center, Austintown, OH, in 2010. For Supporting Partnerships to Assure Ready Kids (SPARK)-Youngstown, program that helps 4 and 5 year old children in targeted neighborhoods get ready for kindergarten
- \$500,000 to Mahoning Valley Organizing Collaborative, Warren, OH, in 2010. For general operating support for Youngstown office
- \$298,760 to Community Advocates for Young Learners, Cambridge, MA, in 2010. For Raymond John Wean Principal's Scholars Project
- \$225,000 to Planned Parenthood of Greater Cleveland, Cleveland, OH, in 2010. For facilities upgrade for Youngstown Health Clinic
- \$60,000 to Burdman Group, Youngstown, OH, in 2010. For capacity building
- \$5,000 to Greater Ohio, Columbus, OH, in 2010. For Restoring Prosperity to Youngstown: Investigating creating a Youngstown Center
- \$5,000 to Mahoning County Family and Children First Council, Youngstown, OH, in 2010. For Using Anti-Blight and Homebuyer Right-to-Know Legal Strategies to Eliminate Lead Hazards from Children's Homes
- \$5,000 to Humility of Mary Health Partners Development Foundation, Youngstown, OH, in 2010. For Rewarding Education through Advanced Careers in Healthcare (REACH)
- \$1,950 to 4 Square Block Watch, Youngstown, OH, in 2010. For Neighborhood Beautification

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## Eli Lilly and Company Foundation

**Last Updated:** 2013-02-05

### At A Glance

(also known as Lilly Foundation)

Lilly Corporate Ctr., D.C. 1627

Indianapolis, IN United States 46285-0001

Telephone: (317) 276-2000

Contact: Robert Lee Smith, Pres.

Fax: (371) 277-6719

URL: [www.lillyfoundation.org](http://www.lillyfoundation.org)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$80,254,855

Total giving: \$26,398,760

### EIN

**990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2006](#) [2005](#) [2004](#) [2003](#) [2003](#) [2002](#) [2001](#)

## Background

Incorporated in 1968 in IN.

## Limitations

Giving on a national and international basis, with emphasis on areas of company operations, including Indianapolis, IN.

No support for religious or sectarian organizations not of direct benefit to the entire community, fraternal, labor, athletic, or veterans' organizations, political organizations or candidates, legislative organizations, or discriminatory organizations.

No grants to individuals, or for scholarships or travel, endowments or capital campaigns (exceptions made by invitation only), debt reduction, medical missions, beauty or talent contests, fundraising activities related to individual sponsorship, conferences or media production, or memorials; no loans.

## Purpose and Activities

The foundation supports programs designed to improve the lives of people who lack the resources to obtain quality healthcare, with a focus on low and middle-income countries; and strengthen public education, with an emphasis on science and math education.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Employee Matching Gifts Program

The foundation matches contributions made by employees and retirees of Eli Lilly to nonprofit organizations involved with arts and culture, education, and health on a one-for-one basis; and to human service organizations through the United Way.

### Lilly Global Giving Program

The foundation, in partnership with the GlobalGiving Foundation, matches contributions made by Lilly employees to grassroots programs around the world. The program gives each employee the opportunity to direct a \$50 toward a project of his or her choosing.

### Volunteer Recognition Program

The foundation awards \$250 grants to nonprofit organizations with which employees of Eli Lilly volunteer.

## Fields of Interest

### Subjects

- American Red Cross
- Arts
- Cancer
- Community/economic development
- Diabetes
- Disasters, preparedness/services
- Elementary/secondary education
- Engineering/technology
- Health care
- Higher education
- Mathematics
- Mental health, depression
- Mental health, schizophrenia
- Mental health/crisis services
- Nerve, muscle & bone diseases
- Public health
- Public health, communicable diseases
- Public policy, research
- Science
- United Ways and Federated Giving Programs
- Youth development

### Population Groups

- Economically disadvantaged

### Geographic Focus

- Indiana



## Types of Support

- Annual campaigns
- Capital campaigns
- Continuing support
- Curriculum development
- Donated products
- Employee matching gifts
- Employee volunteer services
- Equipment
- General/operating support
- Matching/challenge support
- Scholarship funds

## Publications

- Corporate giving report

## Application Information

Unsolicited requests are currently not accepted. The foundation develops and initiates partnerships in specific areas of interest.

Application form not required.

Board meeting date(s): 1st quarter and 3rd quarter

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Eli Lilly and Co.
- Edmund A Cyrol Trust

## Officer and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert Lee Smith \*, Pres.
- Robert A. Armitage  
Affiliation(s):  
*Lilly Cares Foundation, Inc., Dir.*  
*Eli Lilly and Co., Sr. V.P. and Genl. Counsel*
- Enrique A. Contero
- Maria Crowe
- Stephen F. Frye
- John C. Lechleiter, Ph.D.  
Affiliation(s):  
*Lilly Cares Foundation, Inc., Dir.*  
*White Oak Foundation, Inc., Pres.*  
*Eli Lilly and Co., Chair., Pres., and C.E.O.*
- Jan Lundberg
- Susan Mahony
- Anne Nobles
- Bart Peterson  
Affiliation(s):  
*Eli Lilly and Co., Sr. V.P., Comms.*
- Derica W. Rice
- David A. Ricks
- Jeffrey N. Simmons
- Jacques Tapiero
- Fionnuala Walsh

## Memberships

### Regional Associations of Grantmakers

- Indiana Grantmakers Alliance

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2012-12-31

Assets: \$80,254,855 (market value)  
Gifts received: \$35,000,000  
Expenditures: \$27,545,270  
Total giving: \$26,398,760  
Qualifying distributions: \$26,398,760  
Giving activities include:  
\$14,681,954 for 218 grants (high: \$2,454,831; low: \$250)  
\$11,299,469 for 2116 employee matching gifts

### Additional Location Information

County: Marion  
Metropolitan area: Indianapolis-Carmel, IN  
Congressional district: Indiana District 07

### Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$2,454,831 to United Way International, Alexandria, VA, in 2012. For Lilly MDR-TB Partnership Grant Payments and Fees
- \$1,000,000 to YMCA of Greater Indianapolis, Indianapolis, IN, in 2012. For North of South YMCA
- \$750,000 to Mind Trust, Indianapolis, IN, in 2012. For Grow What Works Campaign
- \$500,000 to Riley Childrens Foundation, Indianapolis, IN, in 2012. For Riley Children's Hospital
- \$250,000 to Childrens Museum of Indianapolis, Indianapolis, IN, in 2012. For Terra Cotta Warriors: The Emperor's Painted Army
- \$250,000 to Eskenazi Health Foundation, Indianapolis, IN, in 2012. For The New Wishard Hospital
- \$250,000 to Heifer Project International, Little Rock, AR, in 2012. For Elanco/Heifer International Hunger Relief Projects
- \$58,662 to CARE USA, Atlanta, GA, in 2012. For Treatment Adherence and Follow up of MDR-TB Patients
- \$50,000 to Christel House Academy, Indianapolis, IN, in 2012. For Christel House Academy Watanabe High School
- \$17,500 to La Plaza, Indianapolis, IN, in 2012. For Night of the Americas and Fiesta Indianapolis

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## Rural Community Assistance Corporation

Last Updated: 2014-07-11

### At A Glance

3120 Freeboard Dr., Ste. 201  
West Sacramento, CA United States 95691-5039  
Telephone: (916) 447-2854  
Fax: (916) 447-2878  
E-mail: [rcacmail@rcac.org](mailto:rcacmail@rcac.org)  
URL: [www.rcac.org](http://www.rcac.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### Financial Data

(yr. ended 2013-09-30)  
Assets: \$79,402,726  
Total giving: \$788,023

### EIN

942512284

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Background

Established in 1978 in CA.

The organization was founded in Sacramento, California on Oct. 1, 1978. Funding from The Rosenberg Foundation allowed the organization to establish itself as a multi-state agency that helps build capacity of other nonprofit agencies and create new agencies to serve low-income people living in the rural west.

## Limitations

Giving limited to AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, and WY.

No support for for-profit entities.

No grants to individuals.

## Purpose and Activities

The organization is dedicated to assisting rural communities achieve their goals and visions by providing training, technical assistance, and access to resources.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Loan Fund

The corporation awards the following types of loans: Housing Loans (provides short-term financing for both single and multifamily affordable housing and long-term financing for affordable multifamily units); Environmental Infrastructure Loans (provides loan products for financing water and waste facility projects); and Community Facility Loans (offers short-term loans to meet early acquisition and predevelopment needs, interim construction costs and long-term permanent financing)

## Fields of Interest

### Subjects

- Health care
- Housing/shelter
- Rural development

### Population Groups

- Native Americans/American Indians

## Geographic Focus

- Alaska
- Arizona
- California
- Colorado
- Hawaii
- Idaho
- Montana
- North Dakota
- New Mexico
- Nevada
- Oregon
- South Dakota
- Utah
- Washington
- Wyoming

## Types of Support

- Building/renovation
- Land acquisition
- Program-related investments/loans
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Informational brochure
- Newsletter

## Application Information

Application form required.

Initial approach: Telephone

Board meeting date(s): Feb., May, Aug., and Nov.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert Rendon \*, Pres.  
Affiliation(s):  
*Zions First National Bank, Community Devel. Dir.*
- Anita Gahimer Crow, V.P.  
Affiliation(s):  
*Kinetics, Inc., C.E.O.*
- Nalani Fujimori Kaina, Secy.  
Affiliation(s):  
*Legal Aid Society of Hawaii, Exec. Dir.*
- Joe Herring, Treas.  
Affiliation(s):  
*Region IV Development Association, Inc., Exec. Dir.*  
*Region IV Development Corporation, Inc., Exec. Dir.*  
*Busines Lending Solutions, C.E.O.*
- Frank Bravo  
Affiliation(s):  
*Rabobank N.A., V.P., Community Dev. Fin. Mgr.*
- Lyle Meeks
- Marty Miller  
Affiliation(s):  
*Office of Rural and Farmworker Housing, Exec. Dir.*
- Elizabeth Moore \*  
Affiliation(s):  
*Morgan Stanley, CRA V.P.*
- Rachel Morse  
Affiliation(s):  
*University of Alaska, Anchorage, Interim Dir. of Alumni Relations*  
*University of Alaska, Anchorage, Dir. UAA Alumni Relations*
- Vickie Oldman-John
- David E. Provost  
Affiliation(s):  
*Corporation for Supportive Housing, C.F.O.*
- Gary Severson
- John Sheehan  
Affiliation(s):  
*Plumas Corp., Exec. Dir.*  
*Feather River Community College, Trustee*

## Memberships

### Affinity Groups

- Neighborhood Funders Group

## Financial Data

Year ended 2013-09-30

Assets: \$79,402,726 (market value)

Gifts received: \$14,483,899

Expenditures: \$14,074,267

Total giving: \$788,023

Qualifying distributions: N/A

Giving activities include:

\$788,023 for grants

\$11,040,590 for foundation-administered programs

## Online Communications

- [Twitter](#)
- [Facebook](#)
- [LinkedIn](#)

## Additional Location Information

County: Yolo

Metropolitan area: Sacramento-Arden-Arcade-Roseville, CA

Congressional district: California District 06

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# The William J. and Dorothy K. O'Neill Foundation, Inc.

Last Updated: 2014-02-26

## At A Glance

30195 Chagrin Blvd., Ste. 106

Cleveland, OH United States 44124-5703

Telephone: (216) 831-4134

Contact: Leah S. Gary, Pres. and C.E.O.; Cynthia Drennan, Grants Mgr.; Catherine T. Abbott, Dir.

Fax: (216) 378-0594

E-mail: [info@oneill-foundation.org](mailto:info@oneill-foundation.org)

URL: [www.oneillfdn.org](http://www.oneillfdn.org)

## Type of Grantmaker

Independent foundation

## Additional Descriptor

- Family foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$78,967,608

Total giving: \$3,019,893

## EIN

341560893

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Additional Contact Information

Contact for letter of inquiry: Timothy M. McCue, Sr. Prog. Off., tel.: (216) 831-4136, e-mail: [mccuetmm@oneill-foundation.org](mailto:mccuetmm@oneill-foundation.org);  
For questions regarding the application process or submission of application form: Symone McClain, Mgr. Grants and Office  
Ops., tel.: (216) 831-4135, e-mail: [smcclain@oneill-foundation.org](mailto:smcclain@oneill-foundation.org)

## Background

Established in 1987 in OH.

The William J. and Dorothy K. O'Neill Foundation was founded in 1987 by Mrs. O'Neill and her eldest son, William J. O'Neill, Jr. William J. O'Neill was born in 1906. He was the youngest of four children born to his Irish and German immigrant parents. Dorothy Kundtz O'Neill was born in 1910, and was the youngest of nine children born to her Hungarian and German parents. Both were raised in Cleveland, Ohio in the Catholic family tradition. After graduation from Notre Dame University and St. Mary-of-the-Woods College respectively, they each returned to Cleveland and were married. Mr. O'Neill, with his brothers Hugh M. and Francis J., started and acquired a number of trucking, leasing and transportation companies in the 1940's and 50's. These companies were brought together as Leaseway Transportation Corp. and taken public in 1961. Mr. O'Neill was Leaseway Transportation's first President and later became Chairman of its Board. Under his stewardship, along with that of his brothers, and the subsequent stewardship of his son and nephews, Leaseway Transportation grew to become a billion dollar a year, pre-eminent physical distribution company with operations throughout the United States and in foreign countries as well. Mr. O'Neill, who was noted for his philanthropy, died in 1983. Mrs. O'Neill died in 1998, and is now survived by six children, nineteen grandchildren and thirty-one great grandchildren, many of whom play active roles in the foundation.

## Limitations

Giving primarily in areas where family members reside: the Washington, DC metropolitan area (including Prince George and Montgomery counties in MD), Bonita Springs, Greater Orlando, and Naples, FL, Big Island, HI, Annapolis, Anne Arundel, and Baltimore City, MD, New York, NY, Cleveland, Columbus, and Licking County, OH, Austin and Houston, TX, and Alexandria, Arlington, Richmond and Virginia Beach, VA.

No support for organizations operating outside the U.S., or for agencies engaging in lobbying or evangelization.

No grants to individuals, or for annual campaigns, general operating costs, debt retirement, fundraising events, lobbying activities, capital campaigns or scholarships.

## Purpose and Activities

The foundation's philosophy is rooted in the shared values, sentiments and beliefs of members of the O'Neill family. The foundation exists to serve our fellow human beings. The foundation believes they can best serve by maximizing all their resources and deploying them under well thought-out strategies, developed in partnership with others, in important areas of large beneficial impact. The foundation's vision is for strong communities where families thrive. The foundation's mission is to

partner with nonprofits to improve the quality of life for families and communities, in places where O'Neill family members live.

## **Fields of Interest**

### **Subjects**

- Family services

### **Population Groups**

- Adults
- Adults, men
- Adults, women
- African Americans/Blacks
- Aging
- Asians/Pacific Islanders
- Blind/visually impaired
- Boys
- Children
- Children/youth
- Crime/abuse victims
- Deaf/hearing impaired
- Disabilities, people with
- Economically disadvantaged
- Girls
- Hispanics/Latinos
- Homeless
- Men
- Mentally disabled
- Minorities
- Offenders/ex-offenders
- Physically disabled
- Single parents
- Substance abusers
- Terminal illness, people with
- Women
- Young adults
- Young adults, female
- Young adults, male
- Youth

### **Geographic Focus**

- District of Columbia
- Florida
- Hawaii
- Maryland
- New York
- Ohio
- Texas
- Virginia

### **Types of Support**

- Conferences/seminars
- Consulting services
- Curriculum development
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Technical assistance

### **Publications**

- Application guidelines
- Annual report (including application guidelines)
- Financial statement
- Grants list
- Occasional report

## Application Information

Application form required.

Initial approach: Letter of inquiry via form on foundation web site

Copies of proposal: 3

Board meeting date(s): Mar. 13, July 17 and Oct. 30

Deadline(s): See foundation web site for current deadlines

Final notification: By e-mail and letter

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Dorothy K. O'Neill‡

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Kelly Sweeney McShane \*, Chair.
- Dennis W. Bower \*, Chair., Grantmaking Comm.
- Leah S. Gary \*, C.E.O. and Pres.
- Sara O'Neill Sullivan, Secy.
- Robert W. Donahey \*, Treas.
- William J. O'Neill, Jr., Tr. Emeritus
- Linda M. Clifford
- John H. O'Neill

## Staff

### Number of Staff

3 full-time professional

### Key Staff

*Note: Does not include officers.*

- Symone R. McClain, Mgr., Grants and Office Oper.
- Timothy M. McCue, MPH, Sr. Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Association of Baltimore Area Grantmakers
- Philanthropy Ohio

### Affinity Groups

- Exponent Philanthropy
- Fund for Our Economic Future

## Financial Data

Year ended 2012-12-31

Assets: \$78,967,608 (market value)

Gifts received: \$103,969

Expenditures: \$4,599,449

Total giving: \$3,019,893

Qualifying distributions: \$3,606,582

Giving activities include:

\$3,019,893 for 179 grants (high: \$150,000; low: \$100)

## Online Communications

- [Twitter](#)
- [Facebook](#)

## Additional Location Information

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

Congressional district: Ohio District 11

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$100,000 to Community of Hope, Washington, DC, in 2010.
- \$100,000 to North Hawaii Community Hospital, Kamuela, HI, in 2010.
- \$100,000 to Western Reserve Land Conservancy, Moreland Hills, OH, in 2010.
- \$70,000 to ZviDance, New York, NY, in 2010.
- \$66,667 to Fund for Our Economic Future, Cleveland, OH, in 2010.
- \$31,451 to Saint Martin de Porres High School, Cleveland, OH, in 2010.
- \$20,000 to Burten, Bell, Carr Development, Cleveland, OH, in 2010.
- \$10,000 to University Hospitals Health System, Cleveland, OH, in 2010.
- \$10,000 to Northwest Assistance Ministries, Houston, TX, in 2010.
- \$2,500 to Gilmour Academy, Gates Mills, OH, in 2010.

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## Rockwell Fund, Inc.

**Last Updated:** 2014-06-13

### At A Glance

770 S. Post Oak Ln., Ste. 525  
Houston, TX United States 77056-6660  
Telephone: (713) 629-9022  
Contact: Judy Ahlgrim, Grants Admin.  
Fax: (713) 629-7702  
E-mail: [info@rockfund.org](mailto:info@rockfund.org)  
URL: [www.rockfund.org](http://www.rockfund.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$77,281,547  
Total giving: \$3,058,952

### EIN

746040258

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Trust established in 1931; incorporated in 1949 in TX; merged with Rockwell Brothers Endowment, Inc. in 1981.

Rockwell Fund, Inc. began in 1931 as a charitable trust created pursuant to the will of James M. Rockwell, an early Houston lumberman, investor and civic leader. In 1949, the trust was reorganized as a Texas not-for-profit corporation. Mr. Rockwell and his wife, Sarah Wade Rockwell, owed their fortune to a string of retail lumberyards in West Texas and New Mexico. Mr. and Mrs. Rockwell's estates, as well as those of three of their four children (James W., Lillian and Henry M.) were added to the foundation at various times between 1931 and 1978 when the last of the immediate family, Henry, died. The lumberyards were disposed of years ago, and today the Fund's assets consist of \$117 million in securities. A board of trustees and a staff of six administer the fund.

### Limitations

Giving primarily in Houston, TX.

No support for houses of worship, organizations that target a specific disease, or for parochial, private primary or secondary schools.

No grants to individuals or for medical or scientific research projects, underwriting benefits, dinners, galas, golf tournaments, and fundraising special events, or mass appeal solicitations.

### Purpose and Activities

The foundation's grantmaking priorities focus on tackling issues in a comprehensive and coordinated manner to provide the best outcomes for low-income individuals, families and communities. Its current Issue Areas are: Education: Dropout prevention strategies that target the intermediate and middle school years; Health: Community-based health services, including physical, mental and behavioral health; Housing: Supportive housing, defined as affordable housing coupled with on-site support services needed to achieve self-sufficiency; Workforce Development: Job training/placement and jobs creation/small business development opportunities.



## **Fields of Interest**

### **Subjects**

- Children/youth, services
- Community development, neighborhood development
- Community/economic development
- Employment, services
- Employment, training
- Family services
- Housing/shelter, services
- Human services
- Mental health, counseling/support groups
- Mental health, disorders
- Mental health, treatment
- Mental health/crisis services, association
- Nonprofit management
- Public health
- Secondary school/education

### **Population Groups**

- Adults
- Adults, men
- Adults, women
- Boys
- Children
- Children/youth
- Economically disadvantaged
- Girls
- Hispanics/Latinos
- Homeless
- Men
- Mentally disabled
- Minorities
- Single parents
- Women
- Young adults
- Young adults, female
- Young adults, male
- Youth

## **Geographic Focus**

- Texas

## **Types of Support**

- Continuing support
- Curriculum development
- General/operating support
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Program-related investments/loans
- Seed money
- Technical assistance

## **Publications**

- Application guidelines
- Financial statement
- Grants list

## **Application Information**

Ann on-line letter of inquiry must be submitted first. Please refer to the foundation web site. Applicants should not submit more than 1 proposal per year.

Application form required.

Initial approach: On-line inquiry form

Copies of proposal: 1

Board meeting date(s): Quarterly

Deadline(s): None

Final notification: After each quarterly meeting

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- R. Terry Bell \*, C.E.O. and Pres.
- Margaret E. McConn \*, V.P., C.F.O., and C.I.O.
- Barbara W. Bellatti \*, Secy.
- Whitney Randolph, Treas.
- Domingo Barrios
- Sharon Edwards
- William "Billy" Granville, III

## Staff

### Number of Staff

4 full-time professional

2 full-time support

### Key Staff

*Note: Does not include officers.*

- Judy Ahlgrim, Grants Admin. and Office Mgr.
- Don Titcombe, MSSW, Prog. Off.
- Bernice B. Yu, Prog. Off.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Southwest
- Texas Environmental Grantmakers Group
- Texas Grantmakers Health and Human Services

### Affinity Groups

- Funders Together to End Homelessness
- Grantmakers for Effective Organizations

### Associations and Other Philanthropic Organizations

- Philanthropy Roundtable

## Financial Data

Year ended 2012-12-31

Assets: \$77,281,547 (market value)

Gifts received: \$500

Expenditures: \$4,807,273

Total giving: \$3,058,952

Qualifying distributions: \$4,008,087

Giving activities include:

\$3,058,952 for 44 grants (high: \$575,000; low: \$1)

## Additional Location Information

County: Harris

Metropolitan area: Houston-Sugar Land-Baytown, TX

Congressional district: Texas District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$575,000 to Alliance of Community Assistance Ministries, Houston, TX, in 2012. For general operating support
- \$317,000 to South Texas College of Law, Houston, TX, in 2012. For general civil clinic's battered and homeless women's program
- \$75,000 to Houston Community Health Centers, Houston, TX, in 2012. For Airline Clinic
- \$75,000 to New Hope Housing, Houston, TX, in 2012. For general operating support
- \$65,000 to Depression and Bipolar Support Alliance - Greater Houston, Houston, TX, in 2012. For general operating

support

- \$25,000 to National Alliance on Mental Illness Gulf Coast, Alvin, TX, in 2012. For general operating support

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## Pacific Life Foundation

**Last Updated:** 2014-04-11

### At A Glance

(formerly Pacific Mutual Charitable Foundation)  
700 Newport Center Dr.  
Newport Beach, CA United States 92660-6397  
Telephone: (949) 219-3214  
Contact: Tennyson S. Oyler, Pres.  
Fax: (949) 719-7614  
E-mail: [PLFoundation@PacificLife.com](mailto:PLFoundation@PacificLife.com)  
URL: [www.pacificlife.com/content/content\\_corp/crp/...](http://www.pacificlife.com/content/content_corp/crp/...)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)  
Assets: \$77,116,278  
Total giving: \$5,542,000

### EIN

953433806

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2001](#)

### Background

Established in 1984 in CA.

### Limitations

Giving primarily in areas of company operations in the greater Orange County, CA, area and Omaha, NE; giving also to statewide and national organizations.

No support for political parties or candidates or partisan political organizations, labor or fraternal organizations, athletic or social clubs, K-12 schools, school districts, or school foundations (except for 3T's of Education), sectarian or denominational religious organizations not of direct benefit to the entire community, or sports leagues or teams.

No grants to individuals, or for fundraising events or advertising sponsorships; no in-kind donations.

### Purpose and Activities

The foundation supports programs designed to address health and human services; education; arts and culture; and civic, community, and the environment.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### 3T's of Education Program

The foundation awards grants of \$1,500 to \$10,000 to K-12 schools to enhance student achievement and promote and provide for teacher training, textbooks, and technology.

#### Arts and Culture

The foundation supports programs designed to contribute to a vibrant and diverse cultural sector through performing art centers and museums.

#### Civic, Community, and Environment

The foundation supports programs designed to protect and preserve natural resources of the environment; and community and civic initiatives designed to promote leadership training, civic responsibility, and diversity.

#### Economic Impact Grants

The foundation awards one-time grants to health and human service nonprofit agencies whose services and/or staff have been or will be reduced or eliminated as a result of the State of California or County of Orange budget reductions. Grants range from \$25,000 to \$75,000.

## **Education**

The foundation supports programs designed to provide quality education for youth and adults, including the arts, the environment and science, after-school mentoring and, adult literacy, industry education, and broad-based community initiatives offered by higher-education institutions.

## **Health and Human Services**

The foundation supports programs designed improve the quality of life and health of disadvantaged individuals. Special emphasis is directed toward domestic violence, homelessness, hunger relief, mental health, oral health, physical/developmental disabilities, and senior services.

## **Marine Mammals Program**

Through the Marine Mammals program, the foundation supports whale preservation, conservation of marine mammals, and improving the health of oceans.

## **Matching Gift Program**

The foundation matches contributions made by employees, directors, and life insurance providers of Pacific Life to institutions of higher education, up to \$2,000 per contributor, and up to \$500 to other eligible nonprofits; and to the United Way on a one-for-one basis up to \$5,000 per contributor.

## **Safety Net Organizations**

The foundation provides funding to agencies that support and strengthen the safety net in Orange County, CA and serve uninsured and low-income individuals.

## **Fields of Interest**

### **Subjects**

- Adult education--literacy, basic skills & GED
- American Red Cross
- Arts
- Biology/life sciences
- Children, services
- Civil/human rights, equal rights
- Dental care
- Education
- Elementary/secondary education
- Environment
- Environment, natural resources
- Environment, water resources
- Environmental education
- Family services
- Food services
- Health care
- Homeless, human services
- Human services
- Leadership development
- Mental health/crisis services
- Museums
- Performing arts centers
- Public affairs
- Science
- Youth development, adult & child programs

### **Population Groups**

- Aging
- Economically disadvantaged
- Youth

## **Geographic Focus**

- California
- Nebraska

## **Types of Support**

- Capital campaigns
- Conferences/seminars
- Continuing support
- Employee matching gifts
- Equipment
- General/operating support

- Management development/capacity building
- Program development
- Research

## Publications

- Application guidelines
- Annual report (including application guidelines)
- Grants list

## Application Information

Capital grants range from \$10,000 to \$100,000 and are given to an agency with an organized campaign already under way. Support is limited to 1 contribution per organization during any given year for three years. Organizations must reapply each year. Multi-year funding is not automatic. Audio and video submissions are not accepted. Unsolicited applications for Focus Program Funding and 3T's of Education Program are not accepted.

Application form required.

Applicants should submit the following:

1. Principal source of support for project in the past
2. Copy of IRS Determination Letter
3. Copy of most recent annual report/audited financial statement/990
4. Descriptive literature about organization
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Copy of current year's organizational budget and/or project budget
8. Listing of additional sources and amount of support

Initial approach: Download application form and mail proposal and application form to foundation

Copies of proposal: 1

Board meeting date(s): Oct. or Nov.

Deadline(s): July 15 to Aug. 15

Final notification: Nov.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Pacific Life Insurance Co.
- Pacific Mutual Holding Co.

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- James T. Morris \*, Chair.  
Affiliation(s):  
*Pacific Life Insurance Co., Chair. and C.E.O.*
- Carol R. Sudbeck \*, Vice-Chair.  
Affiliation(s):  
*Pacific Life Insurance Co., Sr. V.P. , Human Resources & Facilities*
- Tennyson S. Oyler \*, Pres.  
Affiliation(s):  
*Pacific Life Insurance Co., V.P., Brand Mgmt. & Public Affairs*
- Michele A. Townsend \*, V.P.  
Affiliation(s):  
*Pacific Life Insurance Co., Comm. Rels. Dir., Public Affairs*
- Jane M. Guon, Secy.
- Joseph L. Tortorelli, Genl. Counsel
- Edward R. Byrd, C.F.O.  
Affiliation(s):  
*Pacific Life Insurance Co., V.P. and Cont.*
- Thomas D. Billard
- David R. Finear
- Luther N. Martin, Sr.  
Affiliation(s):  
*Pacific Life Insurance Co., Sr. Annuity Product Coord., Retirement Solutions Div.*

- Chris van Mierlo  
Affiliation(s):  
*Pacific Life Insurance Co., Chief Mktg. Off., Retirement Solutions Div.*
- Dawn M. Trautman  
Affiliation(s):  
*Pacific Life Insurance Co., Sr. V.P., IT & Strategic Planning, Life Insurance Div.*
- Madhu Vijay  
Affiliation(s):  
*Aviation Capital Group, Exec. V.P. & C.F.O.*
- Rebecca Warwar  
Affiliation(s):  
*Pacific Life Insurance Co., Dir., Corporate Information Tech.*

## Memberships

### Regional Associations of Grantmakers

- Southern California Grantmakers

## Financial Data

Year ended 2012-12-31

Assets: \$77,116,278 (market value)

Gifts received: \$5,214,270

Expenditures: \$5,713,258

Total giving: \$5,542,000

Qualifying distributions: \$5,548,637

Giving activities include:

\$5,542,000 for 747 grants (high: \$1,000,000; low: \$50)

Estimated financial data for year ending 2012-12-31:

Grants: \$5,600,000

## Online Communications

- [Grants List](#)

## Additional Location Information

County: Orange

Metropolitan area: Los Angeles-Long Beach-Santa Ana, CA

Congressional district: California District 48

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$10,000 to University of California, Irvine, CA, in 2010. For COSMOS Program
- \$10,000 to University of Nebraska-Omaha, Omaha, NE, in 2010. For Inside Art Program

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## Valley of the Sun United Way

**Last Updated:** 2013-06-03

### At A Glance

1515 E. Osborn Rd.

Phoenix, AZ United States 85014-5386

Telephone: (602) 631-4800

Contact: Merl Waschler, Pres. and C.E.O.

Fax: (602) 631-4809

E-mail: [information@vsuw.org](mailto:information@vsuw.org)

URL: [www.vsuw.org](http://www.vsuw.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2012-06-30)  
Assets: \$76,865,218  
Total giving: \$71,008,203

## EIN

860104419

## 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 1925 in AZ as the Community Welfare Council and Community Chest of Phoenix.

## Limitations

Giving limited to Maricopa County, AZ.

## Purpose and Activities

The organization works to advance the common good of Maricopa County by focusing on education, income, and health; and by building a caring community where all children and youth succeed, families are self-sufficient, neighborhoods are vital and safe, and all citizens enjoy maximum health and independence.

## Fields of Interest

### Subjects

- Community/economic development
- Human services

### Population Groups

- Children/youth
- Economically disadvantaged

## Geographic Focus

- Arizona

## Officers and Board Members

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Derrick Hall \*, Chair.  
Affiliation(s):  
*Arizona Diamondbacks, Pres. and C.E.O.*
- Merl Waschler \*, Pres. and C.E.O.
- Steve Evans \*, Secy.
- Diane Costantino \*, Treas.  
Affiliation(s):  
*PricewaterhouseCoopers LLP, Managing Partner*
- Katherine Cecala \*, C.O.O.
- Johnny Basha  
Affiliation(s):  
*Bashas' Family of Stores, Vice-Chair.*
- Michael Bender  
Affiliation(s):  
*Walmart Stores, Inc., Exec. V.P. and Pres., Walmart West*
- Michael Bielecki  
Affiliation(s):  
*Lewis and Roca, LLP, Principal, Govt. Rels. Grp.*
- John Bouma  
Affiliation(s):  
*Snell and Wilmer, LLP, Chair.*
- Pamela Conboy  
Affiliation(s):  
*Wells Fargo, Regional Pres., AZ Regional Banking*
- Gonzalo de la Melena  
Affiliation(s):

*Arizona Hispanic Chamber of Commerce, Pres. and C.E.O.*

- Margie Emmermann  
Affiliation(s):  
*Arizona-Mexico Commission, Exec. Dir.*
- Jeff England
- Victor Flores  
Affiliation(s):  
*Arizona Public Service Company, Dir., Exec. Projects and Support, Community Devel.*
- Juanita "Nita" Francis

## Memberships

### Regional Associations of Grantmakers

- Arizona Grantmakers Forum

### Affinity Groups

- Funders Together to End Homelessness
- Organization for Nonprofit Executives

### Associations and Other Philanthropic Organizations

- Alliance of Arizona Nonprofits

## Financial Data

Year ended 2012-06-30

Assets: \$76,865,218 (market value)

Gifts received: \$83,146,567

Expenditures: \$82,678,656

Total giving: \$71,008,203

Qualifying distributions: N/A

Giving activities include:

\$65,952,741 for grants

\$1,537,160 for 1910 grants to individuals

\$4,397,542 for foundation-administered programs

\$3,518,302 for in-kind gifts

## Online Communications

- [YouTube](#)
- [Facebook](#)

## Additional Location Information

County: Maricopa

Metropolitan area: Phoenix-Mesa-Scottsdale, AZ

Congressional district: Arizona District 09

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## The Elisabeth Severance Prentiss Foundation

**Last Updated:** 2014-01-17

### At A Glance

1900 E. 9th St., M.S.-B7-YB13-03-1

Cleveland, OH United States 44114-3404

Contact: Richard Mack, Secy.

Fax: (216) 222-2410

E-mail: [john.baco@pnc.com](mailto:john.baco@pnc.com)

URL: [www.esprentissfoundation.org](http://www.esprentissfoundation.org)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$76,107,782

Total giving: \$3,240,117



## **EIN**

346512433

## **990**

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## **Background**

Trust established in 1944 in OH.

Mrs. Prentiss was the widow of Francis Fleury Prentiss, a Cleveland industrialist who was also president and director of Saint Luke's Hospital. Mrs. Prentiss's first husband, Dudley Peter Allen, was a surgeon and professor of surgery at Western Reserve University. He died in 1915. The trust's funding instrument specified that most of the foundation's activities must be carried on in Ohio. In 1965, the Luther L. and Kate W. Miller Fund was added to the foundation. Other funds established by Mrs. Prentiss and currently held in trust by the National City Bank will be added to the foundation's assets when certain specified life interests have terminated.

## **Limitations**

Giving primarily in the greater Cleveland, OH, area.

No support for national fundraising campaigns.

No grants to individuals, or for scholarships, or generally for surveys, assessments, studies, planning activities, or endowment funds; no loans.

## **Purpose and Activities**

Support primarily for the following five objectives: 1) to promote medical and surgical research and to assist in the acquisition, advancement and dissemination of knowledge of medicine and surgery, and of means to maintain health; 2) to promote public health; 3) to aid hospitals and health institutions in Cuyahoga County, OH, that are organized and operated exclusively for public charitable purposes by contributions for capital improvements or equipment, purchase of rare and expensive drugs, and expenses of operation or maintenance; 4) to improve methods of hospital management and administration; and 5) to aid in establishment and support of plans and programs designed to make hospital and medical care available to all, especially those of low-income.

## **Fields of Interest**

### **Subjects**

- Health care
- Health organizations, association
- Hospitals (general)
- Medical research, institute

## **Geographic Focus**

- Ohio

## **Types of Support**

- Building/renovation
- Continuing support
- Equipment
- General/operating support
- Matching/challenge support
- Program development
- Research
- Seed money

## **Publications**

- Annual report (including application guidelines)

## **Application Information**

Each grant application must include a cover letter. Please see foundation web site for further details.

Application form not required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Signature and title of chief executive officer
3. Qualifications of key personnel
4. Statement of problem project will address
5. Copy of IRS Determination Letter

6. Brief history of organization and description of its mission
7. How project's results will be evaluated or measured
8. Descriptive literature about organization
9. Listing of board of directors, trustees, officers and other key people and their affiliations
10. Detailed description of project and amount of funding requested
11. Copy of current year's organizational budget and/or project budget
12. Listing of additional sources and amount of support
13. Additional materials/documentation

Initial approach: Proposal or letter

Copies of proposal: 6

Board meeting date(s): May and Nov.

Deadline(s): Apr. 15 (for May meeting) and Oct. 15 (for Nov. meeting)

Final notification: Shortly after board meeting

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Elisabeth Severance Prentiss‡
- Luther L. Miller‡
- Kate W. Miller‡

## Officers and Managers

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Quentin Alexander \*, Pres.
- Richard Mack, Secy.
- Elisabeth H. Alexander
- Pamela A. Homsher
- Harry J. Bolwell
- William R. Robertson

## Trustee

- PNC Bank, N.A.

## Staff

### Key Staff

*Note: Does not include officers.*

- John Baco

## Financial Data

Year ended 2012-12-31

Assets: \$76,107,782 (market value)

Expenditures: \$3,625,234

Total giving: \$3,240,117

Qualifying distributions: \$3,287,873

Giving activities include:

\$3,240,117 for grants

## Additional Location Information

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

Congressional district: Ohio District 11

# The Horizon Foundation

**Last Updated:** 2012-09-10

## At A Glance

(formerly The Horizon Foundation of Howard County, Inc.)

10480 Little Patuxent Pkwy., Ste. 900

Columbia, MD United States 21044-3524

Telephone: (410) 715-0311

Contact: Nicolette Highsmith Vernick, Pres. and C.E.O.

Fax: (410) 715-2973  
E-mail: [info@thehorizonfoundation.org](mailto:info@thehorizonfoundation.org)  
URL: [www.thehorizonfoundation.org](http://www.thehorizonfoundation.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Health conversion foundation
- Supporting organization

## Financial Data

(yr. ended 2011-12-31)

Assets: \$75,449,898

Total giving: \$1,639,178

## EIN

522119011

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2000](#) [1999](#)

## Additional Contact Information

E-Mail for Nicolette Highsmith Vernick: [nhighsmith\\_vernick@thehorizonfoundation.org](mailto:nhighsmith_vernick@thehorizonfoundation.org)

## Background

Established in 1998 in MD; converted from the merger between Johns Hopkins Health System and Howard County General Hospital; supporting organization of Howard Community Health Foundation, Inc.

## Limitations

Giving primarily to Howard County, MD.

Generally, no grants for capital campaigns or endowments.

## Purpose and Activities

The foundation seeks to promote and enhance the health and wellness of the greater Howard County, Maryland community.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Capacity Building Grants

The foundation seeks to expand an existing organization's capabilities to address critical health concerns. Grant award may fund specific administrative costs, improvement of internal management capacity, development or improvement of new functions, and expansion of services to meet a greater need.

### Community Health Issues Program (CHIP)

Grants are solicited on an annual basis in response to the identified needs of organizations. Innovative programs may describe how to improve community health and wellness, or support pilot programs to test original or innovative health and wellness service delivery approaches.

### Discretionary Grants

Grants are available for projects that require funding outside of the foundation's various grant cycles. Funding may be for planning activities, feasibility studies, model program development, or specific projects.

### Proactive Grants

Grants may be awarded for planning activities, piloting new health initiatives, developing of innovative service models, and mobilizing of various segments of the community to seek change. Grants may be solicited from a single organization or from a group of organizations. Proposals are by invitation of the foundation, and may be reviewed any time during the year.

### Strategic Initiatives Program (SIP)

Grants are intended to stimulate positive changes in major health and wellness issues that affect the community. Awards may fund activities that include program development, planning, inter-organizational coordination, or pilot programs and projects to improve organizational or program sustainability.

## Fields of Interest

### Subjects

- Aging, centers/services

- Child development, services
- Children, services
- Health care
- Health organizations, information services
- Health organizations, public policy
- Health organizations, reform
- Human services, emergency aid
- Youth, services

### **Population Groups**

- Adults
- Adults, men
- Adults, women
- African Americans/Blacks
- Aging
- Children
- Children/youth
- Disabilities, people with
- Economically disadvantaged
- Hispanics/Latinos
- Minorities

### **Geographic Focus**

- Maryland

### **Types of Support**

- Consulting services
- Equipment
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Seed money
- Technical assistance

### **Publications**

- Application guidelines
- Annual report
- Occasional report

### **Application Information**

Application form required.

Initial approach: Letter, telephone, fax, or e-mail

Copies of proposal: 4

Deadline(s): July for Community Health Issues and Strategic Initiatives; none for Capacity Building Grants and Discretionary Grants

Final notification: Aug. 15 for Strategic Initiatives; Nov. for Community Health Issues; none for Capacity Building Grants and Discretionary Grants

### **Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Shirley Collier \*, Chair.
- John B. Isbister, J.D. \*, Vice-Chair.
- Nicolette Highsmith Vernick \*, Pres. and C.E.O.
- Lynn Coleman \*, Treas.
- Duane Alexander, M.D.
- David Barrett
- Guillermo Birmingham
- Paul Gleichauf
- Charmaine Gordon, J.D.

### **Memberships**

#### **Regional Associations of Grantmakers**

- Association of Baltimore Area Grantmakers
- Washington Regional Association of Grantmakers

#### Affinity Groups

- Grantmakers in Aging
- Grantmakers In Health

#### Financial Data

Year ended 2011-12-31

Assets: \$75,449,898 (market value)

Gifts received: \$20,000

Expenditures: \$3,801,848

Total giving: \$1,639,178

Qualifying distributions: N/A

Giving activities include:

\$1,639,178 for grants

#### Online Communications

- [Twitter](#)

#### Additional Location Information

County: Howard

Metropolitan area: Baltimore-Towson, MD

Congressional district: Maryland District 07

## Sisters of Charity Foundation of Canton

**Last Updated:** 2012-05-09

#### At A Glance

400 Market Ave. N., Ste. 300

Canton, OH United States 44702-1556

Telephone: (330) 454-5800

Contact: Joni T. Close, Pres.

Fax: (330) 454-5909

E-mail: [jclose@scfcanton.org](mailto:jclose@scfcanton.org)

URL: [www.scfcanton.org](http://www.scfcanton.org)

#### Type of Grantmaker

Public charity

#### Additional Descriptor

- Health conversion foundation
- Supporting organization

#### Financial Data

(yr. ended 2011-12-31)

Assets: \$75,386,730

Total giving: \$2,494,013

#### EIN

341832697

#### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

#### Background

Established in 1996 in OH as an equal partnership between the Sisters of Charity of St. Augustine Health System and Columbia/HCA; converted from the sale of the assets of Timken Mercy Medical Center; supporting organization of the Sisters of Charity of St. Augustine.

#### Limitations

Giving primarily in Stark County, OH; giving also in Tuscarawas, Carroll, Holmes, and Wayne counties.

Generally, no grants to individuals, or for capital campaigns, operating expenses of established organizations, debt reduction, general endowment funds (except for specific scholarship funds), health agencies that have a national affiliation, annual appeals, or membership drives.

## **Purpose and Activities**

The foundation focuses on serving the needs of the poor and underserved through its work in the areas of health, education, and social service; the foundation also supports initiatives in early childhood, health care access, and oral health.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Bethlehem Project**

This program awards funding for projects that address the oral health and dental care needs of the poor and underserved that reside within Stark County. The primary goal of the initiative is to enhance access to dental care services for low-income populations and to provide culturally-sensitive oral health promotion services for vulnerable populations. The foundation is piloting an integrated system of oral health care delivery utilizing existing service providers, with the primary objective of establishing a "dental home" for a target group of families.

### **Early Childhood Initiatives**

These are long-term, strategic initiatives that focus on improving the quality of early education and care in Stark County, with the goal of offering the county's children, ages birth through eight, the finest early education and care in the country. In addition, the foundation supports an extensive school readiness program that focuses on children ages three to five.

### **Good Samaritan Grants**

This grant, awarded for up to \$15,000, is intended to support neighborhood or community-based start-up organizations that need funding in order to nurture healthy communities for the poor and underserved.

### **Responsive Grants**

These grants respond to requests from established programs and organizations that support the mission and needs of the Sisters of Charity of St. Augustine. Priority will be given to proposals that focus on: the needs of the poor and underserved; enhancing organizational capacity; innovative ways of supporting children and families; and health care access.

## **Fields of Interest**

### **Subjects**

- Children, services
- Civil rights, race/intergroup relations
- Health care
- Human services
- Youth development

### **Population Groups**

- Adults
- Aging
- Children
- Economically disadvantaged
- Hispanics/Latinos
- Homeless
- Mentally disabled
- Minorities
- Offenders/ex-offenders
- Physically disabled
- Substance abusers

## **Geographic Focus**

- Ohio

## **Types of Support**

- Consulting services
- General/operating support
- In-kind gifts
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Seed money
- Technical assistance

## **Publications**

- Multi-year report
- Newsletter

## **Application Information**

Applications received by fax are not considered or acknowledged; funding is given through periodic RFPs.

Application form required.

Initial approach: Two-page concept form

Copies of proposal: 1

Board meeting date(s): Feb., May, Aug. and Nov.

Deadline(s): Feb. 1 and Aug. 2 (concept form) and Aug. 1 and Sept. 1 (proposal) for Responsive Grants; May 1 and Nov. 1 (concept form) and June 1 and Dec. 1 (application) for Good Samaritan Grants

Final notification: Within 90 days of deadline

## **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Robert F. Belden \*, Chair.
- Ronald Becker \*, Vice-Chair.
- Joni T. Close, Pres.
- Jacqueline Bollas Caldwell \*, Secy.
- David Cornet \*, Treas.
- Fendrich R. Clark
- Lynne Dragomier
- Daniel Fuline
- Msgr. Lewis Gaetano
- Patricia Gramoy
- David C. Kaminski
- Susanna H. Krey
- Michael H. Linz, M.D.
- Hon. Sara Lioi
- Robert Manse, C.P.A.
- John J. McGrath, Ed.D.
- Kathleen M. Poporad
- Gerry Radcliffe, RN, MS
- Sr. Catherine Walsh, CSA
- George T. Williams, D.D.S.

## **Memberships**

### **Regional Associations of Grantmakers**

- Philanthropy Ohio

### **Affinity Groups**

- Early Childhood Funders' Collaborative
- Fund for Our Economic Future
- Grantmakers In Health

## **Financial Data**

Year ended 2011-12-31

Assets: \$75,386,730 (market value)

Gifts received: \$210,566

Expenditures: \$4,914,299

Total giving: \$2,494,013

Qualifying distributions: N/A

Giving activities include:

\$2,494,013 for grants

## **Additional Location Information**

County: Stark

Metropolitan area: Canton-Massillon, OH

Congressional district: Ohio District 07

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# The Sisters of Charity Foundation of Cleveland

**Last Updated:** 2013-06-03

## At A Glance

The Halle Bldg. , 1228 Euclid Ave., Ste. 330  
Cleveland, OH United States 44115-1831  
Telephone: (216) 241-9300  
Contact: Susanna H. Krey, Pres.  
Fax: (216) 241-9345  
E-mail: [mail@socfdncleveland.org](mailto:mail@socfdncleveland.org)  
URL: [www.socfdncleveland.org](http://www.socfdncleveland.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Health conversion foundation
- Religion-affiliated funder
- Supporting organization

## Financial Data

(yr. ended 2011-12-31)  
Assets: \$75,042,363  
Total giving: \$1,992,983

## EIN

341832698

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 1995 in OH; converted from funds made available from the purchase of a 50 percent interest in St. Vincent Charity Hospital and St. John West Shore Hospital.

## Limitations

Giving limited to Cuyahoga and Lorain counties, OH.

No grants to individuals, or for capital campaigns, endowments, annual appeals, or debt retirement.

## Purpose and Activities

The foundation is an extension of the mission and ministry of the Sisters of Charity of St. Augustine and is committed to addressing the needs of the poor and underserved by understanding the root causes of poverty, nurturing the growth of healthy communities, emphasizing youth and family, and measuring the outcomes of these efforts. The foundation provides support to improve access to healthcare, affordable housing, basic job skills training for adults, career advancement for low income/low skill workers, and kindergarten readiness programs for schools of the Catholic Diocese of Cleveland.

## Fields of Interest

### Subjects

- Adult education--literacy, basic skills & GED
- Adult/continuing education
- Elementary/secondary education
- Employment, formal/general education
- Employment, retraining
- Employment, training
- Health care
- Health organizations, public education
- Health organizations, public policy
- Housing/shelter, owner/renter issues
- Housing/shelter, public policy

## Geographic Focus

- Ohio

## Types of Support



- Conferences/seminars
- Curriculum development
- Emergency funds
- Equipment
- General/operating support
- Management development/capacity building
- Program development
- Seed money
- Technical assistance

## Publications

- Annual report
- Grants list
- Informational brochure (including application guidelines)
- Newsletter

## Application Information

See foundation web site for new guidelines.

Application form not required.

Board meeting date(s): Quarterly

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Mary Lou V. Stricklin \*, Chair.
- Tari S. Rivera \*, Vice-Chair.
- Felton Thomas \*, Vice-Chair.
- Susanna H. Krey \*, Pres.
- Daniel J. Mullinger \*, Secy.
- June E. Taylor \*, Treas.
- Rev. Abraham D. Allende
- Jennifer M. Bell
- Patrick G. Bray, M.D.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Ohio

### Affinity Groups

- Funders Together to End Homelessness
- Grantmakers for Education
- Neighborhood Funders Group

## Financial Data

Year ended 2011-12-31

Assets: \$75,042,363 (market value)

Gifts received: \$126,337

Expenditures: \$4,324,224

Total giving: \$1,992,983

Qualifying distributions: N/A

Giving activities include:

\$1,992,983 for grants

## Additional Location Information

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

Congressional district: Ohio District 11

## The Asia Foundation

**Last Updated:** 2014-09-04

### At A Glance

465 California St., 9th Fl.

San Francisco, CA United States 94104-1822  
Telephone: (415) 982-4640  
Contact: Gordon R. Hein, V.P., Progs.  
Fax: (415) 392-8863  
E-mail: [info@asiafound.org](mailto:info@asiafound.org)  
URL: [www.asiafoundation.org](http://www.asiafoundation.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2012-09-30)  
Assets: \$74,761,491  
Total giving: \$31,369,364

## EIN

941191246

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Additional address (DC office): 1779 Massachusetts Ave., N.W., Ste. 815, Washington, DC 20036-2109, tel.: (202) 588-9420, fax: (202) 588-9409, email: [info@asiafound-dc.org](mailto:info@asiafound-dc.org); additional mailing address (CA office): P.O. Box 193223, San Francisco, CA 94119-3223

## Background

Established in 1952 in CA.

## Limitations

Giving primarily in Asia and the Pacific, especially to Afghanistan, Bangladesh, Cambodia, China, East Timor, India, Indonesia, Malaysia, Mongolia, Nepal, Pakistan, Philippines, Sri Lanka, Thailand, and Vietnam.

No grants to individuals (except for Junior Associates in Asian Affairs Program) or U.S.-based organizations.

## Purpose and Activities

The foundation is committed to the development of a peaceful, prosperous, just, and open Asia-Pacific region; the foundation supports programs in Asia that help improve governance, law, civil society, women's empowerment, economic reform and development, and international relations.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Douglas K. Bereuter Program for Junior Associates in Asian Affairs

This program provides graduate students and recent graduate degree holders the opportunity to further their professional development, gain further knowledge of Asia, and better understand the foundation's work through specific assignments such as conducting research, contributing to proposal development, assisting with the design and implementation of programs, and preparing reports on foundation projects. Up to three full-time positions are available during each of the programs offered in the summer and fall. The individuals selected for these short-term affiliations will be placed in one of the foundation's offices in the U.S. (San Francisco or Washington, D.C.) and each Junior Associate will receive a transportation allowance and a monthly stipend during the three-month program. Eligible candidates should have graduate student status or be a recent graduate in Asia-related areas, including international relations, international development, public administration, public policy, law, political science, economics, or sociology with work experience in Asia.

### General Grants Program

The foundation undertakes grant making with organizations as a collaborative process of problem identification and strategic planning within its four areas of programming interest: governance, law, and civil society; women's participation; economic reform and development; and international relations. The foundation directs its support to activities that are within its current interests and are likely to have a wide effect; most of its grants are made to organizations in Asia.

## Fields of Interest

### Subjects

- International affairs

## International Interests

- Asia

## Geographic Focus

- International

## Types of Support

- Conferences/seminars
- Continuing support
- Curriculum development
- Equipment
- Exchange programs
- Fellowships
- General/operating support
- Income development
- In-kind gifts
- Internship funds
- Program development
- Program evaluation
- Publication
- Research
- Scholarship funds
- Technical assistance

## Publications

- Annual report
- Financial statement
- Grants list
- Occasional report

## Application Information

After receiving the letter of inquiry, foundation staff may reply, informing the grant seeker as to whether or not the project fits within the foundation's interests. If it does, foundation staff may ask the grant seeker to submit a formal proposal and/or raise questions for clarification of project.

Application form not required.

Applicants should submit the following:

1. Brief history of organization and description of its mission
2. Detailed description of project and amount of funding requested
3. Copy of current year's organizational budget and/or project budget

Initial approach: Letter of inquiry for General Grants Program; submit application for Douglas K. Bereuter Program for Junior Associates in Asian Affairs

Copies of proposal: 1

Board meeting date(s): Quarterly

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- David R. Andrews
- Michael H. Armacost
- Jennifer Armstrong
- Purnima Bajpai
- William L. Ball, III
- Doris Bebb
- Doug Bereuter
- Louise Bereuter
- Jeffrey T. Bergner
- Susan P. Besemer

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- David M. Lampton \*, Chair.
- Sunder Ramaswamy \*, Vice-Chair.

Affiliation(s):

*Frederick C. Dirks Professor of International Economics, Monterey Institute, International Studies, Pres.*

- Missie Rennie \*, Vice-Chair.  
Affiliation(s):  
*Council on Foreign Relations, Member*
- David D. Arnold \*, Pres.  
Affiliation(s):  
*World Affairs Council of Northern California, Board Member*
- Gordon R. Hein, V.P., Progs.
- Suzanne E. Siskel, Exec. V.P. and C.O.O.  
Affiliation(s):  
*Council on Foundation, Member, Global Philanthropy Committee*  
*Youth Orchestra of the Americas, Board Member*
- Nancy Yuan, V.P.
- Teresita C. Schaffer, Secy.
- Thomas P. Rohlen \*, Treas.  
Affiliation(s):  
*Stanford University, Prof. Emeritus and Sr. Fellow, Institute for Intl. Studies*
- Ken Krug \*, C.F.O.
- Terrence B. Adamson  
Affiliation(s):  
*National Geographic Society, Exec. V.P. and Corp. Secy.*  
*National Geographic Ventures, Dir.*  
*Archives on Presidential Libraries, Member, Advisory Commission*  
*National Legal Center on the Public Interest, Tr.*  
*Henry Luce Foundation, Dir.*
- William L. Ball, III  
Affiliation(s):  
*Maine Maritime Academy, Tr.*  
*Washington Navy Yard, Dir., Naval Historical Fdn.*
- Gina Lin Chu  
Affiliation(s):  
*DC Design International LLC, Dir.*  
*Asia Society, Member, Exec. Comm.*  
*Bhutan Foundation, Tr.*
- Karl Eikenberry  
Affiliation(s):  
*Stanford University, Payne Distinguished Lecturer, Freeman Spogli Institute for Intl. Studies*  
*International Institute for Strategic Studies, Tr.*  
*Council on Foreign Relations, Member*  
*American Academy of Diplomacy, Member*  
*Council of American Ambassadors, Member*
- Susan J. Pharr  
Affiliation(s):  
*Harvard University, Edwin O. Reischauer Prof., Japanese Politics*  
*and Dir., Reischauer Institute of Japanese Studies*

## **Memberships**

### **Affinity Groups**

- International Human Rights Funders Group

### **Associations and Other Philanthropic Organizations**

- Council on Foundations

## **Financial Data**

Year ended 2012-09-30

Assets: \$74,761,491 (market value)

Gifts received: \$149,043,236

Expenditures: \$161,453,978

Total giving: \$31,369,364

Qualifying distributions: N/A

Giving activities include:

\$248,675 for 6 grants (high: \$100,000; low: \$9,555)

\$51,811 for grants to individuals

## Online Communications

- [Facebook](#)
- [Flickr](#)
- [-](#)
- [Google Plus](#)
- [RSS Feed](#)
- [Twitter](#)
- [YouTube](#)

## Additional Location Information

County: San Francisco

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 12

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## Carlisle Area Health and Wellness Foundation

**Last Updated:** 2014-05-21

### At A Glance

274 Wilson St.

Carlisle, PA United States 17013-3633

Telephone: (717) 960-9009

Contact: Rebecca H. Raley, Exec. Dir.

Fax: (717) 960-9992

URL: [www.cahwf.org](http://www.cahwf.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

### Financial Data

(yr. ended 2013-06-30)

Assets: \$73,155,340

Total giving: \$1,949,749

### EIN

231352161

### 990

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2005](#) [2005](#) [2004](#) [2003](#)

### Background

Established in June 2001 in PA; converted from both the proceeds of the sale of the assets of Carlisle Hospital and Health Services, Inc. to Health Management Associates and the transfer of income from related endowments and trusts.

### Limitations

Giving limited to south-central PA.

No support for religious activities, lobbying or political causes, advertising, or athletic, recreational, or alumni activities.

No grants for capital campaigns or endowments.

### Purpose and Activities

The foundation seeks to identify and address health care needs and policies, promote responsible health practices, and enhance access to delivery of health services.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Grants

The foundation provides grants for a wide variety of purposes to health organizations in Adams, Cumberland, and Perry counties that focus on one or more of the following funding areas: obesity and the prevention of major chronic disease (including cardiovascular disease, cancer, diabetes, asthma, and arthritis, primarily through better nutrition, increased physical

activity, and tobacco cessation); primary care and related services (primarily for the un/underinsured, principally in partnership with the Sadler Health Center); system-wide behavioral health issues, especially where mental health issues and substance abuse co-occur; enhancing oral health; and supporting allied health care education, with a focus on needs-based scholarship. Available forms of grantmaking include capacity building (enhancing the skills of boards, staff, or volunteers by training or other organizational development activities), capital (up to \$50,000 per agency for program-related equipment); core/operating support (assisting with the general purpose of an organization, including personnel and administration); demonstrations (supporting a specific initiative or new endeavor); emergency funding and support; emergence support (addressing a new issue now having a documented impact relating to foundation focus areas); program expenses (for maintaining or expanding an existing program); and technical assistance (providing consulting for financial or electronic needs)

## Fields of Interest

### Subjects

- Health care
- Mental health, treatment
- Public health, environmental health
- Public health, obesity
- Public health, physical fitness
- Substance abuse, prevention

## Geographic Focus

- Pennsylvania

## Types of Support

- Capital campaigns
- General/operating support
- Management development/capacity building
- Program development
- Seed money
- Technical assistance

## Publications

- Application guidelines
- Annual report
- Newsletter

## Application Information

Online application process. See web site for additional application information and policies.

Application form required.

Initial approach: Letter of Inquiry via website

Board meeting date(s): Monthly

## Officers and Board Members

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Thomas Coolidge \*, Chair.
- Susan Otway \*, Vice-Chair.  
Affiliation(s):  
*IBM, Member*
- Sherry Hoover \*, Secy.
- Deb Kelley \*, Treas.  
Affiliation(s):  
*Greenawalt & Co., Member*
- Rebecca H. Raley, Exec. Dir.
- Mary Frances Carson
- Jeffery Gayman
- James Hoefler, Ph.D.
- David Hoover, Ph.D.
- Joseph A. Layman, Jr.  
Affiliation(s):  
*Capital Associates, Inc., Member*
- John McClellan
- Patti McLaughlin
- Craig McLean

- June Shoemaker
- Carol Williams
- Stephanie Williams
- Stephen Winn

## Financial Data

Year ended 2013-06-30

Assets: \$73,155,340 (market value)

Gifts received: \$1,151,433

Expenditures: \$2,963,057

Total giving: \$1,949,749

Qualifying distributions: N/A

Giving activities include:

\$1,949,749 for 17 grants (high: \$1,270,493; low: \$8,000)

## Additional Location Information

County: Cumberland

Metropolitan area: Harrisburg-Carlisle, PA

Congressional district: Pennsylvania District 11

## The Steele Foundation, Inc.

**Last Updated:** 2013-12-17

### At A Glance

702 E. Osborn Rd., Ste. 190

Phoenix, AZ United States 85014-5215

Contact: Marianne Cracchiolo Mago, Pres.

E-mail: [grants@steele-foundation.com](mailto:grants@steele-foundation.com)

### Type of Grantmaker

Independent foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$72,806,421

Total giving: \$3,100,502

### EIN

953466880

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Additional Contact Information

Additional address: P.O. Box 1112, Phoenix, AZ 85001

### Background

Established in 1980 in AZ.

### Limitations

Giving primarily in AZ.

No support for political or religious organizations, or for universities outside of AZ.

No grants to individuals, or for events.

### Purpose and Activities

Primary areas of interest are education, holistic health, and community enrichment.

### Fields of Interest

#### Subjects

- Education
- Holistic medicine

## Population Groups

- Children
- Children/youth
- Economically disadvantaged
- Homeless
- Infants/toddlers
- Youth

## Geographic Focus

- Arizona

## Types of Support

- Consulting services
- Curriculum development
- General/operating support
- Income development
- Management development/capacity building
- Matching/challenge support
- Program development
- Program evaluation
- Research
- Scholarship funds
- Technical assistance

## Application Information

Contributes only to pre-selected organizations.

Application form not required.

Board meeting date(s): Nov.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Horace Steele‡
- Ethel Steele‡

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Daniel Cracchiolo \*, C.E.O. and Chair.  
Affiliation(s):  
*Burch & Cracchiolo, P.A., Co-Founder*
- Marianne Cracchiolo Mago \*, Pres.
- Andy Abraham  
Affiliation(s):  
*Burch & Cracchiolo, P.A., Partner*
- Andrea Cracchiolo, III, M.D.  
Affiliation(s):  
*David Geffen School of Medicine at UCLA, Prof., Orthopaedic Surgery*
- Bryant Stooks  
Affiliation(s):  
*Pimco Funds, Dir.*

## Staff

### Number of Staff

3 full-time professional

### Key Staff

*Note: Does not include officers.*

- Amber Stubbs-Skalsky, Program/Grant Mgr.
- Gail Flinn, Dir., Fin.

## Memberships

### Regional Associations of Grantmakers



- Arizona Grantmakers Forum

### Affinity Groups

- Exponent Philanthropy

### Financial Data

Year ended 2012-12-31

Assets: \$72,806,421 (market value)

Expenditures: \$4,073,538

Total giving: \$3,100,502

Qualifying distributions: \$3,671,262

Giving activities include:

\$3,100,502 for 64 grants (high: \$300,000; low: \$1,000)

### Additional Location Information

County: Maricopa

Metropolitan area: Phoenix-Mesa-Scottsdale, AZ

Congressional district: Arizona District 09

### Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$200,000 to Arizona Science Center, Phoenix, AZ, in 2010.
- \$200,000 to Human Services Campus, Phoenix, AZ, in 2010. For operations
- \$150,000 to Educare Arizona, Phoenix, AZ, in 2010. For capital campaign
- \$100,000 to Ryan House, Phoenix, AZ, in 2010. For capital campaign
- \$100,000 to Teach for America, Phoenix, AZ, in 2010.
- \$75,000 to Crisis Nursery, Phoenix, AZ, in 2010.
- \$50,000 to Tucson Arizona Boys Chorus, Tucson, AZ, in 2010. For operations
- \$30,000 to Free Arts of Arizona, Phoenix, AZ, in 2010.
- \$25,000 to Cochise College, Douglas, AZ, in 2010. For operations
- \$18,000 to Childrens Action Alliance, Phoenix, AZ, in 2010. For operations

## The Roberts Foundation

**Last Updated:** 2014-02-19

### At A Glance

2800 Sand Hill Rd., No. 200

Menlo Park, CA United States 94025-7080

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Celebrity: Business
- Family foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$72,325,926

Total giving: \$17,473,785

### EIN

942967074

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2000](#)

### Background

Established in 1985 in CA.

Founded by George R. Roberts, a co-founder of and Senior Partner with Kohlberg Kravis Roberts & Co.(KKR), a private equity firm that sponsors and manages investment funds.

## Limitations

Giving limited to northern CA, with emphasis on San Francisco, San Mateo, Sonoma, Santa Clara, and San Benito counties.

No support for religious organizations.

No grants to individuals, or for medical research, endowment funds, or annual or year-end appeals.

## Purpose and Activities

Support for the Roberts Enterprise Development Fund (REDF) which creates opportunities for homeless and low-income individuals to move out of poverty. REDF partners with a portfolio of Bay Area nonprofit organizations to create jobs and training opportunities in social purpose enterprises.

## Fields of Interest

### Subjects

- Animal welfare
- Animals/wildlife, preservation/protection
- Children/youth, services
- Economic development
- Education, special
- Employment
- Family services
- Health care
- Homeless, human services
- Vocational education

### Population Groups

- Economically disadvantaged
- Homeless

## Geographic Focus

- California

## Types of Support

- Continuing support
- General/operating support
- Program development

## Publications

- Annual report

## Application Information

Currently, the foundation has suspended all grantmaking except for that associated with the Roberts Enterprise Development Fund, URL: <http://www.redf.org>. No proposals are being accepted.

Application form not required.

Board meeting date(s): Approximately Jan. and June

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- George R. Roberts
- Leanne B. Roberts‡
- Hewlett Foundation

## Officers

- George R. Roberts, Pres.  
Affiliation(s):  
*Kohlberg Kravis Roberts & Co., Founder*
- Courtney A. Roberts, V.P.
- Eric B. Roberts, V.P.
- Mark B. Roberts, V.P.
- Sue Schoenthaler, Secy.-Treas.

## Financial Data

Year ended 2012-12-31

Assets: \$72,325,926 (market value)  
Gifts received: \$55,019,842  
Expenditures: \$17,778,341  
Total giving: \$17,473,785  
Qualifying distributions: \$17,533,614  
Giving activities include:  
\$17,473,785 for 61 grants (high: \$5,000,000; low: \$200)

### **Additional Location Information**

County: San Mateo  
Metropolitan area: San Francisco-Oakland-Fremont, CA  
Congressional district: California District 18

### **Selected Grants**

The following grants are a representative sample of this grantmaker's funding activity:

- \$5,000,000 to San Francisco Museum of Modern Art, San Francisco, CA, in 2012. For unrestricted support of the expansion campaign
- \$3,023,031 to Claremont McKenna College, Claremont, CA, in 2012. For Roberts Challenge
- \$2,000,000 to Culver Academies, Culver, IN, in 2012. For Roberts Leadership Scholarship Endowment
- \$1,500,000 to REDF, San Francisco, CA, in 2012. For unrestricted support
- \$1,000,000 to American Enterprise Institute for Public Policy Research, Washington, DC, in 2012. For Road to Freedom Project
- \$1,000,000 to REDF, San Francisco, CA, in 2012. For unrestricted support
- \$584,960 to Culver Educational Foundation, Culver, IN, in 2012. For facilities endowment
- \$125,000 to San Francisco Symphony, San Francisco, CA, in 2012. For unrestricted support
- \$100,000 to San Francisco Museum of Modern Art, San Francisco, CA, in 2012. For unrestricted support
- \$35,000 to Oakland Schools Foundation, Oakland, CA, in 2012. For unrestricted support for Greenleaf Elementary School

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## **Johnson Art and Education Foundation**

**Last Updated:** 2013-09-25

### **At A Glance**

14 Fairgrounds Rd., Ste. A  
Hamilton, NJ United States 08619-3447  
Telephone: (609) 689-1040  
Contact: Michael Unger, C.A.O.; Craig Ingwer, Cont.  
Fax: (609) 689-9046

### **Type of Grantmaker**

Independent foundation

### **Additional Descriptor**

- Family foundation

### **Financial Data**

(yr. ended 2012-12-31)  
Assets: \$72,111,431  
Total giving: \$3,536,000

### **EIN**

223808507

### **990**

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2009](#) [2008](#) [2007](#) [2006](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

### **Background**

Established in 2001 in NJ.

### **Limitations**

Giving primarily in NY and NJ.  
No grants to individuals.

## Purpose and Activities

The foundation was created in 2001 to make grants to charitable organization to further the charitable interests of its founder, J. Seward Johnson, Jr. Currently the strategic focus of support is for organizations that promote greater public appreciation and knowledge of the arts and culture. Priority is given to support for The Sculpture Foundation, Inc. and Grounds For Sculpture, Inc. The foundation operates by making grants to charitable organizations, and by owning, developing and maintaining property for the benefit of Grounds For Sculpture, a public charity, for its exempt purpose.

## Fields of Interest

### Subjects

- Arts, formal/general education
- Arts, management/technical assistance

## Geographic Focus

- New Jersey
- New York

## Types of Support

- Building/renovation
- Equipment
- General/operating support
- Income development
- Matching/challenge support
- Program development

## Application Information

Contributes only to pre-selected organizations.

Application form not required.

Board meeting date(s): May and Nov.

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- J. Seward Johnson, Jr. \*, Chair.
- J.S. Johnson, III \*, Vice-Chair.
- Michael H. Greenleaf \*, Treas.
- Lakshman Achuthan
- Robert Campbell
- Garrett M. Heher
- Charles Jefford
- Carrie Rossip Malcolm

## Financial Data

Year ended 2012-12-31

Assets: \$72,111,431 (market value)

Gifts received: \$3,500,000

Expenditures: \$7,862,899

Total giving: \$3,536,000

Qualifying distributions: \$7,072,449

Giving activities include:

\$3,536,000 for 4 grants (high: \$2,106,000; low: \$50,000)

## Additional Location Information

County: Mercer

Metropolitan area: Trenton-Ewing, NJ

Congressional district: New Jersey District 04

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$3,000,600 to Atlantic Foundation, Hamilton, NJ, in 2011. For temporarily restricted fund
- \$3,000,000 to Sculpture Foundation, Hamilton, NJ, in 2011. For general operating support
- \$2,106,000 to Grounds for Sculpture, Hamilton, NJ, in 2012. For general operating support
- \$1,789,990 to Grounds for Sculpture, Hamilton, NJ, in 2011. For general operating support and capacity building
- \$1,000,000 to Sculpture Foundation, Hamilton, NJ, in 2012. For general operating support

- \$502,000 to Eyebeam Atelier, New York, NY, in 2011. For general operating support
  - \$380,000 to Eyebeam Atelier, New York, NY, in 2012. For general operating support
  - \$60,000 to International Sculpture Center, Hamilton, NJ, in 2011. For general operating support
  - \$50,000 to International Sculpture Center, Hamilton, NJ, in 2012. For general operating support
  - \$10,000 to Art Education for the Blind, New York, NY, in 2011. For program support
- 

## TD Charitable Foundation

**Last Updated:** 2013-12-04

### At A Glance

(formerly TD Banknorth Charitable Foundation)

P.O. Box 9540 , 1 Portland Sq.

Portland, ME United States 04112-9540

Telephone: (207) 756-6947

Contact: Michael L. Rayder, Jr., Mgr.

E-mail: [CharitableGiving@TD.com](mailto:CharitableGiving@TD.com)

URL: [www.tdbank.com/community/grants.html](http://www.tdbank.com/community/grants.html)

### Type of Grantmaker

Company-sponsored foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$70,539,495

Total giving: \$15,659,952

### EIN

141864317

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2005](#) [2004](#) [2003](#) [2002](#)

### Additional Contact Information

E-mail for Michael Rayder: [Michael.Rayder@TDBanknorth.com](mailto:Michael.Rayder@TDBanknorth.com)

### Background

Established in 2002 in ME.

### Limitations

Giving limited to areas of company operations in CT, Washington, DC, DE, FL, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, and VT.

No support for private foundations, political candidates, lobbying, advocacy, research, or discriminatory organizations, fraternal, labor, or veterans' groups, religious organizations not of direct benefit to the entire community, or athletic teams or social groups.

No grants to individuals, or for fundraising events, scholarships, memberships, advertising, annual campaigns, travel or conferences, debt reduction, trips or tours, endowments, or capital campaigns; no general operating support.

### Purpose and Activities

The foundation supports organizations involved with affordable housing; education and financial literacy; and the environment. Special emphasis is directed toward programs designed to support low- to moderate-income individuals by providing services, training, or education that improves the quality of life and provides opportunities for advancement.

### Program Area(s)

The grantmaker has identified the following area(s) of interest:

#### Affordable Housing

The foundation supports programs designed to promote community revitalization and the preservation and development of affordable housing.

#### Education/Financial Literacy

The foundation supports programs designed to promote reading, writing, math, and financial literacy for all ages; pre- and after-school initiatives that reinforce basic learning skills; English as a second language; tutoring and mentorship; and education-focused youth development programs and initiatives.

## **Environment**

The foundation supports programs designed to improve the environment through energy-saving and sustainability; promote environmental awareness and education; and engage the community in active preservation of natural surroundings.

## **Housing for Everyone Grant Competition**

The foundation annually awards grants to nonprofit organizations designed to make a meaningful difference in meeting the affordable housing needs in their community. A different theme aiming to improve affordable housing is announced every year. Grants range from \$10,000 to \$100,000.

## **Non-Profit Training Resource Fund**

The foundation awards grants of up to \$1,000 to nonprofit organizations for employees to attend approved classes and courses designed to enhance job performance. Special emphasis is directed toward organizations designed to promote affordable housing for low-to-moderate income individuals; increase economic and small business development; provide financial literacy programming to low- and moderate-income youth, individuals, or families; and promote afterschool or extracurricular programming for children from low-to-moderate income households.

## **Fields of Interest**

### **Subjects**

- Community development, small businesses
- Community/economic development
- Education
- Education, ESL programs
- Education, reading
- Education, services
- Environment
- Environment, energy
- Environment, natural resources
- Food banks
- Housing/shelter
- Housing/shelter, development
- Housing/shelter, rehabilitation
- Human services
- Human services, financial counseling
- Mathematics
- United Ways and Federated Giving Programs
- Youth development
- Youth development, adult & child programs

### **Population Groups**

- Economically disadvantaged

### **Geographic Focus**

- Connecticut
- District of Columbia
- Delaware
- Florida
- Massachusetts
- Maryland
- Maine
- North Carolina
- New Hampshire
- New Jersey
- New York
- Pennsylvania
- Rhode Island
- South Carolina
- Virginia
- Vermont

### **Types of Support**

- Annual campaigns
- Employee matching gifts
- Employee volunteer services
- Management development/capacity building
- Program development
- Sponsorships

## Publications

- Application guidelines
- Corporate giving report
- Grants list
- Program policy statement

## Application Information

Organizations receiving support for the Non-Profit Training Resource Fund are required to provide a certificate of completion or other evidence of the employee's attendance of the training. Support is limited to 1 contribution per organization during any given year. Visit website for application deadlines.

Application form required.

Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Statement of problem project will address
3. Population served
4. Copy of IRS Determination Letter
5. Brief history of organization and description of its mission
6. Geographic area to be served
7. Copy of most recent annual report/audited financial statement/990
8. How project's results will be evaluated or measured
9. Listing of board of directors, trustees, officers and other key people and their affiliations
10. Contact person
11. Copy of current year's organizational budget and/or project budget
12. Listing of additional sources and amount of support

Initial approach: Complete online application

Board meeting date(s): Quarterly

Deadline(s): Varies by state; July 5 to Sept 2 for Housing for Everyone Grant Competition; None for Non-Profit Training Resource Fund

Final notification: 2 weeks following committee meeting; Nov. for Housing for Everyone Grant Competition; 2 to 6 weeks for Non-Profit Training Resource Fund

Additional information: Requests for the Non-Profit Training Resource Fund should include a description of the organization's size and capacity, the course's impact on the organization and community, and how the information will be used to impact the organization or provide a new service; descriptive literature on the course; and the documented approval of the organization's executive director.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Banknorth Group, Inc.
- American Savings Bank
- TD Banknorth Inc.
- Cape Cod Bank and Trust Co.
- Interchange Bank
- Commerce Bancorp, Inc.
- Carolina First Foundation

## Officers and Directors

- Elizabeth K. Warn, Pres.  
Affiliation(s):  
*TD Bank, Sr. V.P., Community Devel.*
- Mark Crandall, V.P.
- Geoffrey Ryan, Secy.
- Paul Young, Treas.
- Greg Braca
- Michael Carbone
- Michael Collins
- Fred Graziano
- Brian Haier
- Lisette Lieberman
- Scott Mullin
- Jeff Nathanson
- Sandra Sharman

## Staff

### Key Staff

*Note: Does not include officers.*

- Michael L. Rayder, Jr., Mgr.

## Memberships

### Regional Associations of Grantmakers

- Maine Philanthropy Center

## Financial Data

Year ended 2012-12-31

Assets: \$70,539,495 (market value)

Gifts received: \$194

Expenditures: \$16,329,894

Total giving: \$15,659,952

Qualifying distributions: \$16,058,535

Giving activities include:

\$15,659,952 for 1541 grants (high: \$250,000; low: \$100)

## Online Communications

- [Housing for Everyone Grant Recipients](#)

## Additional Location Information

County: Cumberland

Metropolitan area: Portland-South Portland-Biddeford, ME

Congressional district: Maine District 01

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$313,900 to United Way of Greater Philadelphia and Southern New Jersey, Philadelphia, PA, in 2012. For United Way Community Campaign
- \$150,000 to ACCION East, New York, NY, in 2012. For Maine to Miami Microlending and Financial Education Initiative
- \$120,000 to New Jersey Citizen Action Education Fund, Newark, NJ, in 2012. For 2012 Housing, Community and Economic Development Programs
- \$100,000 to College of Charleston Foundation, Charleston, SC, in 2012. For 4th Century Initiative
- \$100,000 to Peoples Emergency Center, Philadelphia, PA, in 2012. For Bigham Place Project
- \$50,000 to Salvation Army, A New York Corporation, West Nyack, NY, in 2012. For Food Service Program
- \$7,500 to Womens Enterprise Development Center, White Plains, NY, in 2012. For 15 Week Entrepreneurial Training and Technical Assistance Program
- \$7,500 to Rebuilding Together Broward County, Oakland Park, FL, in 2012. For Safe and Healthy Homes Program
- \$5,000 to Jersey Cares, Newark, NJ, in 2012. For Environmental Program
- \$5,000 to Homeless Emergency Project, Clearwater, FL, in 2012. For Family Transition

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## Dakota Medical Charities

**Last Updated:** 2014-08-30

### At A Glance

4141 28th Ave. S.

Fargo, ND United States 58104-8403

Telephone: (701) 271-0263

Contact: J. Patrick Traynor, Pres.

Fax: (701) 271-0408

E-mail: [pattraynor@dakmed.org](mailto:pattraynor@dakmed.org)

URL: [dakmed.org](http://dakmed.org)

### Type of Grantmaker

Public charity

### Additional Descriptor

- Supporting organization



## Financial Data

(yr. ended 2012-09-30)

Assets: \$70,504,244

Total giving: \$871,383

## EIN

450368679

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Additional Contact Information

Toll-free tel.: (877) 977-5770

## Background

Established in 1982 in ND; supporting organization of Dakota Medical Foundation.

## Limitations

Giving limited to Becker, Clay, Clearwater, Hubbard, Mahnommen, Norman, Ottertail, Pennington, Polk, Red Lake, Wadena, and Wilkin counties, MN; and Barnes, Benson, Cass, Dickey, Eddy, Foster, Grand Forks, Griggs, Kidder, LaMoure, Logan, McIntosh, Nelson, Ramsey, Ransom, Richland, Sargent, Steele, Stutsman, Traill, Walsh, and Wells counties, ND.

## Purpose and Activities

The organization operates exclusively for charitable, scientific and educational purposes in support of Dakota Medical Foundation.

## Program Area(s)

The grantmaker has identified the following area(s) of interest:

### Responsive Grants

The foundation considers proposals that provide innovative, measurable solutions to proven health problems. Preference will be given to proposals that seek to improve access to healthcare, or prevent chronic disease, especially for children. Eligible applicants must be tax-exempt organizations that are based in the foundation's service area.

## Fields of Interest

### Subjects

- Dental care
- Health care
- Medicine/medical care, public education
- Public health

## Geographic Focus

- Minnesota
- North Dakota

## Types of Support

- Conferences/seminars
- Consulting services
- Curriculum development
- Emergency funds
- Equipment
- General/operating support
- Income development
- Matching/challenge support
- Program development
- Program evaluation
- Publication
- Scholarship funds
- Seed money

## Publications

- Annual report
- Financial statement
- Grants list
- Informational brochure (including application guidelines)

- Newsletter

## Application Information

Application form required.

Initial approach: Telephone or letter

Copies of proposal: 2

Board meeting date(s): Jan., Apr., July and Oct.

Deadline(s): Varies

Final notification: 30 days after submission for letter of intent and 75 days after submission for grant application

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- J. Patrick Traynor \*, Pres.
- David Clutter, M.D. \*
- Jay Eisenbeis
- Joel Haugen, M.D.
- Cindy Keller
- Chris Kennelly, J.D.
- Larry Leitner
- Debra Magnuson, B.S.N.
- Susan Mathison, M.D.

## Financial Data

Year ended 2012-09-30

Assets: \$70,504,244 (market value)

Gifts received: \$9,188

Expenditures: \$2,105,570

Total giving: \$871,383

Qualifying distributions: N/A

Giving activities include:

\$871,383 for 26 grants (high: \$181,000; low: \$5,500)

## Additional Location Information

County: Cass

Metropolitan area: Fargo, ND-MN

Congressional district: North Dakota District At-large

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## The Joseph Meyerhoff Fund, Inc.

**Last Updated:** 2014-04-25

### At A Glance

1 South St., Ste. 1000

Baltimore, MD United States 21202-7301

Contact: Terry Rubenstein, V.P. and Secy.

E-mail: [info@magnajm.com](mailto:info@magnajm.com)

URL: [www.meyerhoffcharitablefunds.org](http://www.meyerhoffcharitablefunds.org)

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Family foundation

## Financial Data

(yr. ended 2012-12-31)

Assets: \$70,215,246

Total giving: \$2,902,609

## EIN

526035997

## Additional Contact Information

Additional contact: Misty Gibson, Grants Admin.

## Background

Incorporated in 1953 in MD.

## Limitations

Giving primarily in Baltimore, MD, and New York, NY; some funding also to organizations in Israel.

No grants to individuals.

## Purpose and Activities

Giving primarily to support and encourage cultural and higher educational programs and institutions and to facilitate immigration and absorption of new immigrants into Israel.

## Fields of Interest

### Subjects

- Arts
- Higher education
- Human services
- Jewish agencies & synagogues
- Jewish federated giving programs

### International Interests

- Israel

### Population Groups

- Immigrants/refugees

## Geographic Focus

- Maryland
- New York

## Types of Support

- Annual campaigns
- Building/renovation
- Capital campaigns
- Continuing support
- Debt reduction
- Emergency funds
- Endowments
- Equipment
- Fellowships
- General/operating support
- Land acquisition
- Matching/challenge support
- Professorships
- Program development
- Publication
- Research
- Scholarship funds
- Seed money

## Application Information

Contributes only to pre-selected organizations.

Application form not required.

Board meeting date(s): May and Oct.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Joseph Meyerhoff‡

- Mrs. Joseph Meyerhoff†
- Meyerhoff Charitable Income Trust
- Katz Charitable Income Trust
- Meyerhoff Charitable Income Trust II
- Katz Charitable Income Trust II
- Rebecca Meyerhoff Memorial Trusts
- The Rebecca Meyerhoff Philanthropic Fund

## Officer

- Jill M. Hieronimus, Pres.
- Terry M. Rubenstein, V.P. and Secy.
- Joseph Meyerhoff, II, V.P. and Treas.
- Eleanor Katz, V.P.

## Staff

### Number of Staff

1 part-time professional  
1 part-time support

### Key Staff

*Note: Does not include officers.*

- Misty Phillips Gibson, Grants Admin.
- Elizabeth Minkin
- Rafi Rone

## Memberships

### Regional Associations of Grantmakers

- Association of Baltimore Area Grantmakers

### Associations and Other Philanthropic Organizations

- Maryland Association of Nonprofit Organizations

## Financial Data

Year ended 2012-12-31

Assets: \$70,215,246 (market value)

Expenditures: \$3,772,350

Total giving: \$2,902,609

Qualifying distributions: \$3,016,395

Giving activities include:

\$2,902,609 for 97 grants (high: \$350,000; low: \$1,000)

## Additional Location Information

County: Baltimore City

Metropolitan area: Baltimore-Towson, MD

Congressional district: Maryland District 07

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$531,179 to Associated: Jewish Community Federation of Baltimore, Baltimore, MD, in 2010.
- \$300,000 to Baltimore Symphony Orchestra, Baltimore, MD, in 2010.
- \$140,000 to University of Maryland-Baltimore Foundation, Baltimore, MD, in 2010.
- \$75,000 to Bnai Brith Youth Organization, Washington, DC, in 2010.
- \$45,000 to Curriculum Initiative, Delmar, NY, in 2010.
- \$41,300 to American Jewish Joint Distribution Committee, New York, NY, in 2010.
- \$30,000 to American Committee for the Weizmann Institute of Science, New York, NY, in 2010.
- \$28,203 to Foundation for Morristown Medical Center, Morristown, NJ, in 2010.
- \$25,000 to Friends of Patterson Park, Baltimore, MD, in 2010.
- \$15,000 to Jubilee Baltimore, Baltimore, MD, in 2010.

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## The Kimball Foundation

**Last Updated:** 2014-01-14

## At A Glance

(formerly Sara H. and William R. Kimball Foundation)  
1660 Bush St., Ste. 300  
San Francisco, CA United States 94109-5308  
Telephone: (415) 561-6540  
Fax: (415) 561-6477  
URL: [www.pfs-llc.net/kimball/kimball.html](http://www.pfs-llc.net/kimball/kimball.html)

## Type of Grantmaker

Independent foundation

## Additional Descriptor

- Family foundation

## Financial Data

(yr. ended 2012-12-31)  
Assets: \$69,591,375  
Total giving: \$2,957,945

## EIN

943263448

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Additional Contact Information

Submission e-mail: [submissions@kimballfoundation.org](mailto:submissions@kimballfoundation.org). Contact for questions or concerns about a specific request for support: Eric Sloan, Sr. Prog. Off.: e-mail: [esloan@pfs-llc.net](mailto:esloan@pfs-llc.net); contact for questions about the submission process, or if applicant does not receive an e-mail response within 2-3 business days verifying proposal receipt: Wendy Yu Einhorn, Prog. Coord., e-mail: [weinhorn@pfs-llc.net](mailto:weinhorn@pfs-llc.net)

## Background

Established in 1997 in CA.

## Limitations

Giving primarily in San Francisco, San Mateo, Sonoma, and Marin counties, CA; to a limited extent, the foundation also funds in Santa Clara County, as far south as Palo Alto.

No support for medical research organizations.

No grants to individuals or for endowment drives, events, annual appeals, videos, medical research, religious organizations, or the environment.

## Purpose and Activities

Giving primarily to provide opportunities to the disadvantaged and at-risk, including education, youth development, academic enrichment, tutorials, leadership development, vocational training, employment, and sports, recreation and arts activities for low-income youth. High priority is given to organizations which promote college access and encourage community service for low-income youth. Grants in the arts are made to groups that predominately serve youth.

## Fields of Interest

### Subjects

- Children/youth, services
- Environmental education
- Historic preservation/historical societies

## Geographic Focus

- California

## Types of Support

- Program development

## Publications

- Application guidelines
- Annual report
- Grants list

## Application Information

Full proposals are by invitation only, upon review of letter of intent; grant renewal requests are by invitation only. Application information as well as guidelines for interim grant requests and full proposals available on foundation web site.

Application form not required.

Applicants should submit the following:

1. Results expected from proposed grant
2. Brief history of organization and description of its mission
3. Detailed description of project and amount of funding requested
4. Contact person
5. Copy of current year's organizational budget and/or project budget

Initial approach: Letter of intent on organization letterhead

Copies of proposal: 1

Board meeting date(s): Spring, summer, and fall

Deadline(s): Aug. 29 - Sept. 2 (for letters of intent)

Final notification: 2 to 3 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Sara H. Kimball‡
- William R. Kimball‡

## Officers

- Gretchen B. Kimball, C.E.O. and Pres.
- Stephen C. Kimball, V.P.
- Donald J. McCubbin, C.F.O. and Treas.

## Directors

- Gerald F. Brush, Jr.
- Andrew W. Edwards
- Anne C. Kimball
- Jeffrey L. Kimball

## Memberships

### Regional Associations of Grantmakers

- Northern California Grantmakers

## Financial Data

Year ended 2012-12-31

Assets: \$69,591,375 (market value)

Gifts received: \$1,100,000

Expenditures: \$3,865,720

Total giving: \$2,957,945

Qualifying distributions: \$3,371,720

Giving activities include:

\$2,957,945 for 152 grants (high: \$100,000; low: \$100)

## Online Communications

- [Grants List](#)

## Additional Location Information

County: San Francisco

Metropolitan area: San Francisco-Oakland-Fremont, CA

Congressional district: California District 12

## Selected Grants

The following grants are a representative sample of this grantmaker's funding activity:

- \$100,000 to Eastside College Preparatory School, East Palo Alto, CA, in 2012. For general operating support
- \$50,000 to Juma Ventures, San Francisco, CA, in 2012. For Pathways to Advancement Program
- \$50,000 to Businesses United in Investing, Lending and Development, Redwood City, CA, in 2012. For Peninsula

Youth Entrepreneurship Program

- \$50,000 to San Francisco Symphony, San Francisco, CA, in 2012. For 30,000 - unrestricted, 20,000 - Youth Orchestra
  - \$40,000 to Outward Bound California, San Francisco, CA, in 2012. For the Bay Area Center
  - \$25,000 to Bay Area Video Coalition, San Francisco, CA, in 2012. For Digital Pathways component of Next Generation Programs, providing low-income youth with training and internships in digital media in San Francisco
  - \$25,000 to Collective Impact, Danville, CA, in 2012. For Providing academic enrichment, personal skills development, and case management for low-income children and youth in San Francisco
  - \$25,000 to Student Conservation Association, Arlington, VA, in 2012. For Providing vocational development, service learning, and environmental education to low-income southern San Mateo youth
  - \$25,000 to Boys and Girls Clubs of Sonoma Valley, El Verano, CA, in 2012. For Teen Services program
  - \$15,000 to TheaterWorks, Palo Alto, CA, in 2012. For Write On! San Mateo playwriting initiative
- 

## The Fred A. Lennon Charitable Trust

**Last Updated:** 2014-01-24

### At A Glance

29425 Chagrin Blvd., Ste. 201  
Cleveland, OH United States 44122-4602  
Contact: Chris Hitchcock

### Type of Grantmaker

Independent foundation

### Additional Descriptor

- Celebrity: Business
- Family foundation

### Financial Data

(yr. ended 2012-12-31)

Assets: \$68,717,446

Total giving: \$2,504,167

### EIN

341761181

### 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

### Background

Established in 1993 in OH.

Founded by the late Fred A. Lennon, who was the founder and former Chair. of Swagelok Company, a privately held international company, focusing on the manufacture and sale of gas and fluid systems components.

### Limitations

Giving primarily in northeast OH.

No grants to individuals; no loans.

### Purpose and Activities

Giving primarily for health and economic development.

### Fields of Interest

#### Subjects

- Economic development
- Health care
- Higher education

### Geographic Focus

- Ohio

### Types of Support

- Annual campaigns
- Building/renovation

- Capital campaigns
- Continuing support
- Equipment
- General/operating support
- Income development
- Internship funds
- Management development/capacity building
- Matching/challenge support
- Program development
- Research
- Scholarship funds
- Seed money

## Publications

- Informational brochure (including application guidelines)

## Application Information

Application form not required.

Initial approach: Letter

Copies of proposal: 1

Board meeting date(s): May and Oct.

Deadline(s): Apr. 1 and Sept. 1

Final notification: Up to 6 months

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Fred A. Lennon‡

## Trustees

- A. Anton
- T. Janoch
- E.A. Lozick
- T. Ryan
- N. Tobbe

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Ohio

### Affinity Groups

- Exponent Philanthropy
- Fund for Our Economic Future

## Financial Data

Year ended 2012-12-31

Assets: \$68,717,446 (market value)

Expenditures: \$3,189,726

Total giving: \$2,504,167

Qualifying distributions: \$2,753,846

Giving activities include:

\$2,504,167 for 119 grants (high: \$400,000; low: \$1,000)

## Additional Location Information

County: Cuyahoga

Metropolitan area: Cleveland-Elyria-Mentor, OH

Congressional district: Ohio District 11

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## Community Loan Fund of New Jersey

Last Updated: 2014-09-02

## At A Glance



(doing business as New Jersey Community Capital)  
108 Church St., 3rd Fl.  
New Brunswick, NJ United States 08901-2002  
Telephone: (737) 640-2061  
Contact: Wayne Meyer, Pres.  
Fax: (737) 543-1201  
E-mail: [mail@njclcf.com](mailto:mail@njclcf.com)  
URL: [www.newjerseycommunitycapital.org](http://www.newjerseycommunitycapital.org)

## Type of Grantmaker

Public charity

## Additional Descriptor

- Organization that normally receives a substantial part of its support from a governmental unit or from the general public

## Financial Data

(yr. ended 2012-09-30)  
Assets: \$68,193,220  
Total giving: N/A

## EIN

222872262

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

## Background

Established in 1987 in NJ.

## Limitations

Giving limited to NJ.

## Purpose and Activities

The fund makes loans and provides technical assistance for affordable housing, child care, community facilities, and business development benefiting lower income people and communities throughout New Jersey.

## Fields of Interest

### Subjects

- Business/industry
- Children, day care
- Community/economic development
- Economic development
- Housing/shelter

### Population Groups

- Economically disadvantaged

## Geographic Focus

- New Jersey

## Types of Support

- Building/renovation
- Equipment
- Land acquisition
- Program-related investments/loans
- Technical assistance

## Publications

- Annual report
- Newsletter

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Dudley Benoit \*, Chair.  
Affiliation(s):  
*Lowenstein & Sandler, Member*
- Kenneth Zimmerman \*, V.P.
- Alle Ries \*, Secy.
- Carl Malmstrom \*, Treas.
- Wayne T. Meyer \*, Pres.
- Gregory M. Stankiewicz \*, C.O.O.
- Jacki Robinson \*, C.F.O.
- Ellen Brown  
Affiliation(s):  
*New Jersey Institute for Social Justice, C.O.O*
- Patrick Kelly  
Affiliation(s):  
*Bank of America Corporation, Community Development Market Manager*
- Carl H. Malmstrom  
Affiliation(s):  
*Venture Investment Associates (VIA), V.P. and C.F.O.*
- Wayne Meyer

## Memberships

### Affinity Groups

- National Children's Facilities Network
- The Forum for Sustainable and Responsible Investment (US SIF)

## Financial Data

Year ended 2012-09-30

Assets: \$68,193,220 (market value)

Gifts received: \$6,991,297

Expenditures: \$5,200,003

Total giving: N/A

Qualifying distributions: N/A

## Online Communications

- [Facebook](#)
- [YouTube](#)
- [LinkedIn](#)
- [Twitter](#)

## Additional Location Information

County: Middlesex

Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Congressional district: New Jersey District 06

# The Springfield Foundation

**Last Updated:** 2014-08-22

## At A Glance

333 N. Limestone St., Ste. 201

Springfield, OH United States 45503

Telephone: (937) 324-8773

Contact: Ted Vander Roest, Exec. Dir.; For grants: Susan Carey, Dir., Grants and Scholarships

Fax: (937) 324-1836

E-mail: [info@springfieldfoundation.org](mailto:info@springfieldfoundation.org)

URL: [www.springfieldfoundation.org](http://www.springfieldfoundation.org)

## Type of Grantmaker

Community foundation

## Financial Data

(yr. ended 2013-12-31)

Assets: \$67,910,614  
Total giving: \$2,395,045

## **EIN**

316030764

## **990**

[2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2005](#) [2004](#) [2003](#)

## **Additional Contact Information**

Grant application e-mail: [susan@springfieldfoundation.org](mailto:susan@springfieldfoundation.org)

## **Background**

Incorporated in 1948 in OH.

## **Limitations**

Giving limited to Clark County, OH.

No support for sectarian worship, instruction, or proselytizing, fraternal, labor, athletic, and social or veterans' groups, or private or parochial schools.

No grants to individuals (except for designated scholarships), or for annual memberships or dues, grants management or consultant fees, debt retirements, deficit financing, annual fund drives or fundraising activities, or school bands and school choral groups, drill teams, or color guards.

## **Purpose and Activities**

The foundation raises, strengthens, and distributes permanent charitable funds to benefit Clark County, OH.

## **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

### **Arts & Culture**

This area includes performing and/or visual arts and programs that support the arts. Grants in this area can include funding for performances, exhibits, programs, projects, supplies, operations, etc. Intended Impacts: 1) make art and culture accessible for new audiences and community participants; 2) educate people about new and emerging and innovative approaches to art; 3) facilitate access to and participation in art & cultural programs for persons with low to moderate income and the disabled; 4) ensure the availability of a broad array of artistic opportunities and venues that reflect the diversity of the community; 5) encourage collaboration/integration of the arts with other funding areas such as education or health; and 6) historic Preservation and Awareness.

### **Civic/Community Affairs**

The foundation provides assistance in areas of economic development, public safety, civic improvement, voter awareness, justice, promoting the community. Impacts include: 1) community beautification/pride; 2) promote community safety; 3) promote and encourage the development of healthy, viable neighborhoods; 4) increase the exposure and use of the media locally; 5) economic development; 6) promotion of civic involvement; 7) recreational activities that are broad based; and 8) services for the common good, i.e., programs of the Fire or Public Safety Departments, public parks.

### **Education**

This area addresses the educational needs of people from birth through adulthood. Funds can be used to enhance the experience of students directly, or to provide additional resources to teachers and educational programs. Impacts include: 1) preparing children for kindergarten. Involving parents in their children's education; 2) preparing students for science, technology, engineering, math, medicine (STEMM) areas; 3) increase high school graduation rate; 4) increase number of students enrolling in college or other post secondary training; 5) increase financial literacy; 6) adult education and career training; and 7) professional development for educators.

### **Environment, Conservation and Animal Welfare**

This area is defined as projects that preserve natural features of the local area, or enhance or re-develop features that have been neglected over time. This area includes funding for animals, parks and natural resources. Impacts include: 1) increase access to and sustainability of natural resources; 2) promotion of green technologies; 3) environmental education, outreach and awareness; and 4) efforts to improve the basic health and welfare of animals.

### **Health**

The foundation provides support for medical programs and facilities. Impacts include: 1) supporting non profit public health clinics; 2) childhood obesity reduction; 3) indigent health care; 4) health education; 5) pre-natal care; 6) minority health issues; 7) mental health; 8) preventative healthcare; 9) chronic disease prevention; and 10) long term disabilities.

### **Human Services**

This area addresses basic human needs of food, shelter, clothing, and seeking solutions to systemic social problems. Impacts include: 1) decrease community and domestic violence; 2) programs to educate, advocate and assist immigrants in obtaining citizenship; 3) programs to promote basic needs such as food, shelter, clothing; 4) efforts that reduce poverty and the causes of

poverty; 5) promote affordable housing; 6) decrease foreclosure rate; and 7) disaster preparation and relief.

### **Scholarships**

Through the generosity of many families and individuals, the foundation manages more than 55 scholarship funds for the benefit of eligible students. Students benefit from the financial assistance as well as the academic recognition of being a scholarship recipient. Each scholarship fund targets students with different characteristics such as graduation from a particular high school, plans to attend a specific college or selection of a certain field of study such as finance, fine arts, and nursing. See web site for additional information.

### **Fields of Interest**

#### **Subjects**

- Animals/wildlife
- Arts
- Education
- Environment
- Health care
- Human services
- Public affairs

#### **Population Groups**

- African Americans/Blacks
- Blind/visually impaired
- Children/youth
- Crime/abuse victims
- Deaf/hearing impaired
- Disabilities, people with
- Homeless
- Infants/toddlers
- Mentally disabled
- Physically disabled
- Youth

### **Geographic Focus**

- Ohio

### **Types of Support**

- Curriculum development
- Equipment
- General/operating support
- Program development
- Program evaluation
- Publication
- Research
- Scholarships--to individuals
- Seed money
- Technical assistance

### **Publications**

- Application guidelines
- Annual report
- Financial statement
- Grants list
- Informational brochure (including application guidelines)
- Newsletter
- Program policy statement

### **Application Information**

Visit foundation web site for online application.

Application form required.

Applicants should submit the following:

1. Role played by volunteers
2. Timetable for implementation and evaluation of project
3. Signature and title of chief executive officer
4. Results expected from proposed grant
5. Statement of problem project will address

6. Population served
7. Name, address and phone number of organization
8. Brief history of organization and description of its mission
9. Geographic area to be served
10. Copy of most recent annual report/audited financial statement/990
11. How project's results will be evaluated or measured
12. Listing of board of directors, trustees, officers and other key people and their affiliations
13. Detailed description of project and amount of funding requested
14. Plans for cooperation with other organizations, if any
15. Contact person

Initial approach: Submit online application

Board meeting date(s): Mar., June, Sept., and Dec.

Deadline(s): Aug. 15 for discretionary grant letters of inquiry; Mar. 1 for scholarship applications

Final notification: Approx. 6 weeks for initial response; Mid-Dec. for grant determination

## Officers and Trustees

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Andy Bell \*, Pres.
- Plato Pavlatos \*, V.P.
- Randall Comer \*, Secy.
- Kim Nedelman Fish \*, Treas.
- Ted Vander Roest, Exec. Dir.
- Tamimi Angle
- Dean Blair
- Bill Brougher
- Bob Burton
- Lula Cosby
- Cathy Crompton
- William Fralick
- Gus Geil
- Debbie Hill
- Robyn Koch-Schumaker
- Edward Leventhal
- Tom Loftis
- Mel Marsh
- Maureen Messaro
- Dan O'Keefe
- David Sanders
- Bill Scarff
- Jagdish Singh
- Les Smithers
- Michelle Sweeney

## Staff

### Number of Staff

5 full-time professional

### Key Staff

*Note: Does not include officers.*

- Teresa Brumfield, Office Mgr.
- Suzie Carey, Financial Off.
- Joan Elder, Dir., Grants
- Patty Lavy, Dir., Devel.

## Memberships

### Regional Associations of Grantmakers

- Philanthropy Ohio

### Associations and Other Philanthropic Organizations

- Council on Foundations

## Financial Data

Year ended 2013-12-31

Assets: \$67,910,614 (market value)  
Gifts received: \$1,798,917  
Expenditures: \$3,169,178  
Total giving: \$2,395,045  
Qualifying distributions: \$2,768,601  
Giving activities include:  
\$1,714,023 for 95 grants  
\$681,022 for 301 grants to individuals

## Online Communications

- [Facebook](#)

## Additional Location Information

County: Clark

Metropolitan area: Springfield, OH

Congressional district: Ohio District 08

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# The Regenstein Foundation

**Last Updated:** 2013-09-19

## At A Glance

401 S. LaSalle St., Ste. 205  
Chicago, IL United States 60605-1042  
Telephone: (312) 362-0535  
Contact: Susan L. Regenstein, Chair.

## Type of Grantmaker

Independent foundation

## Additional Descriptor

- Celebrity: Business

## Financial Data

(yr. ended 2012-12-31)  
Assets: \$66,558,211  
Total giving: \$3,127,500

## EIN

363152531

## 990

[2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

## Background

Incorporated in 1950 in IL as the Joseph & Helen Regenstein Foundation; in 1981 merged into Regenstein Foundation which was incorporated in DE.

Founded by the late Joseph Regenstein, who was an industrialist whose philanthropy benefited the city of Chicago, especially the University of Chicago, at which the Regenstein Library, named after Mr. Regenstein, is still maintained by grants from the foundation. The foundation was also responsible for the Hall of Music at Northwestern University, the Large Mammal Habitat and the Birds of Prey Exhibit at the Lincoln Park Zoo, the Sea Otter Habitat located in the Shedd Aquarium, and the Vegetable Garden in the Botanical Gardens.

## Limitations

Giving primarily in the metropolitan Chicago, IL, area.

No grants to individuals, or for scholarships, fellowships, annual campaigns, seed money, emergency funds, deficit financing, publications, conferences, or matching gifts; no loans.

## Fields of Interest

### Subjects

- Arts
- Botanical gardens
- Children/youth, services

- Hospitals (specialty)
- Human services
- Zoos/zoological societies

## Geographic Focus

- Illinois

## Types of Support

- Building/renovation
- Capital campaigns
- Equipment
- Program development
- Research

## Publications

- Application guidelines
- Program policy statement

## Application Information

Most grants made on the initiative of the directors. Historically, the foundation has concentrated the majority of its grants toward one-time capital projects. Grants for continuing annual operations are limited and selective in scope.

Application form required.

Applicants should submit the following:

1. Signature and title of chief executive officer
2. Results expected from proposed grant
3. Copy of IRS Determination Letter
4. Copy of most recent annual report/audited financial statement/990
5. Detailed description of project and amount of funding requested
6. Copy of current year's organizational budget and/or project budget
7. Listing of additional sources and amount of support

Initial approach: Proposal with foundation Grant Questionnaire

Copies of proposal: 1

Board meeting date(s): May and as required

Deadline(s): Mar. 31 and Sept. 30

Final notification: 30 days

Additional information: Often pledges for grants will result in the foundation's prospective income being unavailable for substantial periods of time. Due to the periodic nature of trustee meetings and long-range view of grants which the foundation has taken, it is suggested that applicants needing immediate help seek other sources for funds. Receipt of proposals are acknowledged, but interviews are very rarely granted.

## Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name.*

- Joseph Regenstein‡
- Helen Regenstein‡
- Velsicol Corporation
- Arvey Corporation

## Officers and Directors

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

- Susan L. Regenstein \*, Chair. and Acting Pres.
- Pat Wallies, Exec. Dir.
- Marshall Field, V  
Affiliation(s):  
*Chicago Community Trust, Vice-Chair.*  
*Chicago Community Foundation, Vice-Chair.*
- Robert N. LaTour
- F. Oliver Nicklin, Jr.
- Joseph Regenstein, III

## Financial Data

Year ended 2012-12-31

Assets: \$66,558,211 (market value)  
Expenditures: \$4,026,636  
Total giving: \$3,127,500  
Qualifying distributions: \$3,183,102  
Giving activities include:  
\$3,127,500 for 36 grants (high: \$1,020,000; low: \$2,500)

### **Additional Location Information**

County: Cook

Metropolitan area: Chicago-Naperville-Joliet, IL-IN-WI

Congressional district: Illinois District 07

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**Generated on 2014-09-10**