The Community Foundation Public Awareness Initiative is a client of the Philanthropy Practice at Van Scoyoc Associates.
Donor-Advised Funds & Civic Engagement

*Stories of civic engagement from the following states can be found on these pages:*

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For Marilyn Meyers Buckey, success is the product of smart succession, both in business and philanthropy.

Through her family’s funds at Akron Community Foundation, Marilyn and her daughters have assumed their forefathers’ tradition of working hard, giving back, and passing it on. Marilyn’s father, Robert A. Meyers, succeeded her grandfather as president of the family business, The W.E. Wright Company. Marilyn’s dad provided well for the family, but he also wanted to provide for his community. “He had worked so hard all of his life, but he felt like he had not given enough,” Marilyn said. “He wanted to make sure he had something in place to give back to the community and give thanks.”

For years, Robert and his wife, Jean, had volunteered with Akron Rotary, Bluecoats, the Akron General Women’s Board, and many other local charities. But, like the family business, they wanted to create something lasting that they could hand down from generation to generation. So they started the Robert A. and Jean C. Meyers Family Fund at Akron Community Foundation. Today, Marilyn recommends grants to causes her parents loved during their lifetime, particularly education. Like her parents, Marilyn is passionate about leaving a charitable legacy in her family’s name, and in 2013, she started the Marilyn Meyers Buckey Family Fund, which will engage her children, grandchildren and great-grandchildren in philanthropy. All told, the Meyers and Buckey family funds have contributed nearly $200,000 to local charities since their inception.

“[Robert Meyers] had worked so hard all of his life, but he felt like he had not given enough,” Marilyn said. “He wanted to make sure he had something in place to give back to the community and give thanks.”
Jeanne Davis and Leo Bustad like to “give where they live” and to inspire others to do the same. They have been involved with the Alaska Community Foundation for more than a decade. Motivated by the belief that too many Alaskans who have made their livelihoods and wealth in Alaska leave the state upon retirement and take their money with them, they view The Alaska Community Foundation as a vehicle for those who have done well in Alaska to “do good.” Leo and Jeanne established their donor-advised fund in 2004 and, through it, have given generously to causes they believe in ever since.

Since the creation of the fund, Jeanne and Leo have recommended multiple grants over the years to numerous nonprofits and educational institutions. For them, it is a flexible mechanism that makes accomplishing their philanthropic goals easier. One cause Leo supports is the Alaska Neighborhood Health Center, which provides a health safety net for Alaskans in-need. Leo believes in the organization enough to both support it philanthropically and to work there once a week to provide cardiology consulting to patients. Leo has also served on the board of the Alaska Community Foundation for nine years, including serving as Board Chair, and continues to serve on the Investment Committee. This example shows how opening a donor-advised fund allows Jeanne and Leo to stay deeply connected to their community by donating not only their money, but their time.

One cause Leo supports is the Alaska Neighborhood Health Center, which provides a health safety net for Alaskans in-need. Leo believes in the organization enough to both support it philanthropically and to work there once a week to provide cardiology consulting to patients.
Arizona Community Foundation

Dr. Michael and Doris Lawson established The Molly Lawson Foundation with the assistance of the Arizona Community Foundation. Through their fund, the Lawsons focus on helping people with disabilities like their daughter Molly, while enjoying their own unique interest, such as local arts organizations. Inspired by the unique challenges faced by their own daughter, the Lawsons use their fund to support clinical research into disorders that are particularly limiting for individuals with disabilities. Additionally, the Arizona Community Foundation helps the Lawsons identify local arts organizations to support, including Scottsdale Training and Rehabilitation Services, or STARS; Detour Company Theatre; the AZDance Group; the Thunderbird Foundation, serving the Native American community in northern Arizona; and equine assisted therapies at Hoofbeats with Heart.

Ties to Arizona are strong for Gene and Barbara Polk, Prescott residents since the 1950s. They raised their children, Julie, Ken and Tom, to share their respect for the generations of Arizonans who came before them, optimism about the future, and commitment to giving back. The Polk family is known for stepping up whenever help is needed, from the arts to historical preservation to education to the environment. Gene and Barbara’s children are carrying on the charitable tradition, with plans to pass the torch to their children and grandchildren as well. Barbara’s lifetime commitment to children’s issues has left its mark with area nonprofit organizations. She served on the Board of Directors in the early years of the Arizona Community Foundation, and she and Gene were instrumental in establishing ACF’s affiliated Yavapai County affiliate. Today, Gene is a trustee of the J.W. Kieckhefer Foundation, while Tom, a local attorney, is a trustee of the Margaret T. Morris Foundation.

Barbara and Gene recently established the Polk Family Fund, a donor-advised fund at Arizona Community Foundation, with their grandchildren named as successor fund advisors. Through this fund, grandchildren Tom and Gene can celebrate Barbara’s generous spirit, and they have endowed the Barbara Jean Polk Spirit of Volunteerism award with the Prescott division of Arizona Women’s Education & Employment (AWEE) to recognize local volunteers.

Inspired by the unique challenges faced by their own daughter, the Lawsons use their fund to support clinical research into disorders that are particularly limiting for individuals with disabilities.
The Georgia Rural Libraries Initiative (GRLI) was developed in 2004 from a donor’s concern about poor rural counties lacking an economic base and trained workforce. Literacy can improve the chances that kids will be ready for, succeed in, and graduate from school, serving as a better resource for economic development in the county. Knowing the extent of the issue, the donor began conversations with his philanthropic advisor at the Community Foundation for Greater Atlanta on how to leverage his donor-advised fund to have an impact on child literacy, and to become more personally involved in this issue.

The GRLI coordinates existing public and private resources and explores additional resources to enhance early childhood reading in five rural Georgia counties. Since its establishment, the donor has been deeply involved in the initiative, including the selection of each of the five participating counties, annual site visits, and review of semi-annual assessment reports and evaluations. The donor also interacts regularly with his philanthropic advisor at the Foundation, along with an outside consultant retained to be the liaison between the Foundation, Ferst Foundation for Childhood Literacy, and the individual county libraries and community action teams.

According to a survey conducted by the program consultants, the GRLI has been successful in enhancing the children’s sections of each library. This has significantly increased overall library visibility, permanently increased adult engagement with the library, and led to greater recognition that the library is a critical resource in the community. Results from the survey also indicated that both high school graduation rates and standardized test scores improved (in some cases, significantly) in all five counties during the GRLI period.
In 2012, after decades of living out of state, Cynthia Parker Stack came to the Arkansas Community Foundation looking to memorialize her brother, Jacques Parker. Initially, Ms. Stack envisioned a scholarship endowment. However, upon further discussion, she decided that given the size of her endowment, programmatic grants to schools could impact more students than a scholarship, and she established the Jacques Parker Memorial Endowment, a donor-advised endowment.

While the grants usually go to Carlisle High School, a public high school in Lonoke County, the donor-advised option has enabled Ms. Stack and her family to stay involved and continue to develop their working relationship with the high school and the school district. The Carlisle School district has been supportive in allowing the Carlisle High School principal and teachers to make requests for programs that would enrich the students’ learning experience especially in History, Math, Science, and Culture.

In working directly with the high school, Ms. Stack learned that many of the students had not been outside of Lonoke County and had never visited a museum or eaten in a restaurant. In response, field trips to the Clinton Presidential Library and the headquarters of Heifer International have become annual affairs for the entire junior class. Grants from the Jacques Memorial Parker Endowment have helped to cover trip expenses including entrance fees. Grants have also gone to underwrite class attendance at theatrical performances and live science demonstrations by the Museum of Discovery brought into the school for all 7-12 grade students. The Parker Endowment is a great example of how a donor used the tool of a DAF to get more personally involved in his or her philanthropy.
Growing up in Austin’s Tarrytown neighborhood in the 1950s, a young man struggled to read and write despite being an inquisitive child with highly educated parents. As he grew older he found success through courage, hard work, and his gift of relating easily with others. He served for three years in Vietnam including during the brutal Tet Offensive. Upon his return, he put his people skills and ability to work, opening an antique shop. Later he discovered why certain tasks like writing letters home from the war were so difficult for him: He was dyslexic.

After 25 years of turning cast-off items into treasures, he closed his store to invest in real estate and the stock market with great success. In recent years, his financial advisor suggested he open a charitable donor-advised fund, which would allow him to give to nonprofit causes. Since he opened his fund at the Austin Community Foundation last year, he has especially enjoyed providing support for Rawson Saunders, the only school in Austin designed especially for children with dyslexia. “Dyslexia means extraordinary,” is the motto of Rawson Saunders School – but it can also be applied to this donor, who is helping children reach their full potential through his donor-advised fund.
When a young attorney moved to Baltimore, she was determined to put down roots in her new community. The acquisition of her company presented an opportunity to become active in the community, and she determined that opening a donor-advised fund at the Baltimore Community Foundation was an efficient way to begin. She found that the Foundation’s communications about its work to address challenges facing the community kept her up to date on civic affairs and her interest in education issues. She volunteered to serve on the Foundation’s committee overseeing grantmaking and was subsequently recruited to join the Board of Trustees.

This donor now serves as chair of the Foundation’s Education Committee and she has provided significant support for the Foundation’s work in education and in neighborhoods, as well as contributed to initiatives that prepare Baltimore City middle school students for academically rigorous high schools. Through the Baltimore Community Foundation, this donor has contributed both time and money to improving outcomes for young people in Baltimore.

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New Schools for Baton Rouge (NSBR) was launched in April 2012 with the goal of providing new, excellent school options to 12,000 students living in north Baton Rouge by 2017. The organization was founded with the support of community leaders and the Baton Rouge Area Foundation (BRAF) to deliver high quality schools where students today have only underperforming options. NSBR is rooted in the idea that strategic partnerships among the civic community – nonprofit, business, faith, philanthropic, and other local leaders – will lead to more responsive and effective solutions that deliver high quality schools and excellent educational outcomes to students and families.

The vision and impact of NSBR would not be possible without BRAF and its donors, who collectively prioritized this leadership initiative in 2012. Through its donor-advised funds, BRAF quickly aggregated support in excess of $3 million to support NSBR’s launch and operations for its first three years. When presented with a challenge from a national philanthropic organization of more than $2 million, BRAF again helped collate support to meet the local match requirement. But the support of BRAF is so much more than financial. NSBR and its donors remain committed to success for students and families most in need of proven, excellent school options and will drive toward systematic change in education across the city of Baton Rouge.

While this example does not provide a story of one particular family, it demonstrates the convening role community foundations play in creating long-term impact in the community. The New Schools for Baton Rouge initiative has successfully brought together donors, students, and the community-at-large to raise more than $22 million for its Excellence Fund that is supporting 12,000 students attending new schools by 2017.
Dr. Bill Dunham established his donor-advised fund at the Community Foundation of Greater Birmingham while he was still practicing medicine. Following his retirement in 2008, Dr. Dunham used his knowledge of the needs of the community to help start the Community of Hope Clinic, the first and only free clinic in Shelby County to provide treatment to low-income, uninsured or under-insured patients. The community foundation staff was instrumental in helping Dr. Dunham turn his philanthropic goals into reality. Dr. Dunham has continued to seek the input of the Foundation staff on additional giving opportunities to provide access to health care for uninsured and under-insured individuals. He also continues to serve as a volunteer at the Community of Hope Clinic every Tuesday.

Mr. Mike Luce first partnered with the Community Foundation of Greater Birmingham in 2011 to provide a 25 percent local match to Cooperative Downtown Ministries to leverage significant federal funding to establish permanent, supportive housing for chronically homeless men in the Greater Birmingham area. Following this partnership, Mr. Luce and his wife created a donor-advised fund at the Foundation. Mr. Luce has supported the project annually since that time and also volunteers at the housing facility that was recently completed as a Bible study leader and mentor to the clients being served. Through his donor-advised fund, Mr. Luce has provided 50 percent of the funding to a targeted after-school and summer learning program at Tarrant City Schools (a small K-12 public school system with a majority of students qualifying for free- or reduced lunch). As a result of his involvement, Mr. Luce volunteers as a tutor on a weekly basis with the after-school and summer program.

Dr. Susan Walley and her husband, Dr. Ryan Walley, created a donor-advised fund in 2007 to streamline their charitable giving and to create a structure through which they would teach their three young sons about giving back. In 2011, following the devastating tornadoes which struck the state of Alabama, Tyler (then age 8) and Harrison (then age 5) asked their friends to make a donation to the Foundation’s Alabama Tornado Recovery Fund in lieu of bringing birthday gifts to their parties. Through a site visit, Susan, Ryan and their three sons (now aged 11, 8 and 5) have also become active with Prechool Partners, an early learning program that provides parental classes in addition to quality instruction to low-income children in greater Birmingham. Susan conducts regular classes on health and nutrition topics such as smoking cessation and childhood obesity prevention.

Through his donor-advised fund, Mr. Luce has provided 50 percent of the funding to a targeted after-school and summer learning program at Tarrant City Schools (a small K-12 public school system with a majority of students qualifying for free- or reduced lunch).
Brian and Ashley Huff passionately support various organizations and ministries that meet both local and international needs through a donor-advised fund at the Central Carolina Community Foundation. The vast majority of the causes they support are faith-based organizations that make a tangible difference in the lives of others. The Central Carolina Community Foundation connected the Huffs to local organizations like Oliver Gospel Mission, The Free Medical Clinic and The Cooperative Ministry, which help some of the Midland’s most vulnerable citizens. Around the world, Samaritan’s Purse and World Vision aid victims of war, poverty, natural disaster, and disease. Brian’s enthusiasm for helping others rings in his voice as he describes the causes that he and Ashley care about most.

The Huffs are particularly passionate about organizations that reach out to youth and young adults, such as Adrian Despres of Kingdom Building Ministries, which reaches thousands of students and young adults each year. Through their donor-advised fund, the Huffs are not only able to support organizations they care deeply about, but they are able to become personally involved. Mr. Huff now serves as chaplain for the University of South Carolina’s football team and created the Fellowship of Christian Athletes (FCA, the largest Christian campus ministry in the world), using athletics as a medium to reach athletes and coaches.

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Ruth Shapiro Blumberg, who passed away at the age of 91, created The Martha Fund as a lasting tribute to the daughter she loved and lost too soon. Martha Blumberg accomplished great things in her short life — gaining recognition as a promising young artist when she was just 12 years old. In that same year, she began dialysis for a kidney disorder. Despite her health issues, Martha graduated from Jamesville-Dewitt High School in 1979 and attended Yale University for two years. She was doing well in her studies but chose to leave school to pursue her passion for music; however, she died in 1985 at the age of 23 waiting for what would have been her third kidney transplant. Sydney Blumberg, Ruth’s husband and a respected lawyer in Syracuse for more than 50 years, died not even a full year after his daughter’s passing.

Through her grief, Ruth persevered and carried on with her lifelong commitment to many volunteer activities. She served as a children’s docent at the Everson Museum of Art, a board member of the Syracuse Symphony, and a volunteer for Crouse Hospital. She was particularly proud of her efforts through the National Council of Jewish Women to establish a library in an inner-city school, and the establishment of Martha’s Room at Hospice to serve grieving children. Martha’s zest for life will be honored in perpetuity through The Martha Fund, a fund to support children’s programs in Onondaga County.

Countless children in the Central New York region will benefit from the generous commitment Ruth made to ensure that her daughter’s memory would not be forgotten when she herself passed away. Such “field of interest” funds carry forward the mission of individual donors who want to support a particular issue or region. These funds provide grant dollars that can be deployed to meet community needs that arise in the chosen focus area over time. The Martha Fund is an example of the power that donor-advised funds have in creating a lasting impact in the community, while honoring the life of Martha Blumberg.

Countless children in the Central New York region will benefit from the generous commitment Ruth made to ensure that her daughter’s memory would not be forgotten when she herself passed away.
Howard Levine, CEO of Family Dollar, recently gifted $45 million to a donor-advised fund and announced a grant program that targets low-income people and struggling families. Mr. Levine has been a contributor and philanthropist in issues surrounding generational poverty for many years. Through a series of educational opportunities on poverty and introductions to key agencies by FFTC, he recognized the underserved and at risk population and awarded $1 million grant to jump-start “A Way Home” – a new program that helps homeless families and veterans find housing more quickly. A Way Home Endowment Fund is a program created through FFTC and run by local human service agencies.

Mr. Levine also gave $500,000 to a Central Piedmont Community College (via a Veterans Scholarship Fund and a Veterans Resource Center at its Levine Campus) after hearing directly about the needs of returning veterans through an initiative at FFTC. The scholarship fund will provide financial assistance to military vets who lack GI Bill benefits, or whose benefits are inadequate to cover their educational costs. The resource center will provide counseling, academic advising, and other support services to veterans studying at the Levine Campus. These two grant examples are but a snapshot of the types of grants that Mr. Levine has awarded with his donor-advised fund.

A donor-advised endowment fund holder, whose love of the outdoors has prompted her to make a multitude of grants to environmental issues, made a $1 million gift to the Carolina Thread Trail, a regional network of greenways and trails that stretches over 1,000 miles and reaches 15 counties, two states and 2.3 million people. The donor developed her love of the environment as a child and was introduced to the community foundation by her father. The endowment fund was created through her father’s estate and has allowed for deep connections to be built between the local land conservancies, climate change organizations, and the donor. The Thread Trail project was launched and is maintained by a supporting organization of FFTC.

Mr. Levine recognized the underserved and at risk population and awarded $1 million grant to jump-start “A Way Home” – a new program that helps homeless families and veterans find housing more quickly.
Block-by-Block began as a humble idea from two nonprofits, a small neighborhood ministry, and the Affordable Housing Network. The goal of Block by Block was to rebuild and revitalize neighborhoods seriously damaged by the 2008 flood by empowering homeowners to rebuild. In order to turn this idea into a reality, they would need funds that they simply didn’t have access to at the time. To connect with philanthropic-minded individuals, they reached out to the Greater Cedar Rapids Community Foundation, which was able to help make those connections. Upon hearing of the project, donor-advised fund holders and local business owners John and Dyan Smith stepped forward to contribute $1 million to this transformational project. Another investment of $750,000 came from a local partner in philanthropy, the Hall Perrine Foundation. These two lead gifts, combined with a contribution of $1.2 million from the Community Foundation’s Flood Fund, led to many other public and private gifts. Once funded, Block-by-Block got to work – with the first block restored in October 2009. Today, nearly 300 homes on 25 blocks have been rehabilitated – largely because of donors who used their DAFs to deepen their commitments to the community.

Jan Bloomhall became involved with the Greater Cedar Rapids Community Foundation when her family opened a fund in 2002. For many years she reviewed applications for the donor-advised fund, gaining a unique insight into the challenges and opportunities for area nonprofit organizations. During that time Jan had harbored an interest in veteran’s issues, in part because of her father’s service, but also because she recognized that they are often underserved as a population. Jan decided she wanted to get involved in the community as a volunteer, and through Foundation staff she learned about a newly forming organization – the Iowa Veterans Welcome Center. Jan accompanied Foundation staff on a site visit, and quickly became an invested volunteer and supporter of the organization. Jan aids in helping the organization fulfill its mission of meeting the needs of and providing support to all military veterans, both by serving as an administrative volunteer, and by using her deep community knowledge to advance the organization’s mission. She is helping them gain the resources to expand their food pantry and has connected other volunteers to the resources that are available through the Foundation. Jan has quickly become one of the Iowa Veterans Welcome Center’s biggest public advocates.

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The shooting of Hadiya Pendleton in January 2013 hit close to home for Bill and Cheryl Lowry. The 15-year-old honor student was caught in the crossfire of gang violence in a park about 10 feet from the Lowrys’ backyard. This tragic incident not only garnered national headlines and cast the spotlight on gun violence in Chicago, it also troubled the Lowry family to see the problem so close to their doorsteps. That’s when their 17-year-old son Evan asked them, “What are you going to do about all this violence around us?”

The Lowrys responded to their son’s call to action: They created The It’s Time Organization (TITO) to prevent and reduce violence in Chicago, and partnered with The Chicago Community Trust to aid the new organization in fulfilling its mission. Founded in February 2013, The It’s Time Organization makes grants to nonprofit organizations that work to alleviate violence in neighborhoods in the South Side of Chicago. This year TITO awarded its inaugural grants. For example, BUILD, a nonprofit that provides programs for at-risk youth in the West Side, received a grant from TITO to expand the nonprofit’s leadership and career-preparation programs to the South Side for 10 to 15 teenagers.

The Lowrys established a donor-advised fund at the Trust for TITO so the organization could start raising funds and engaging donors right away. The Trust provides financial management of the fund uses its grantmaking expertise to help TITO evaluate nonprofits that it may want to support. Beyond the operational benefits, the Lowrys are proud to partner with the Trust because of its deep commitment to improving the lives of underserved residents in the region. “I value so much that the Trust gives voice to folks who often are not heard, and shines a light on situations that maybe some other organizations may choose not to shine a light on,” says Cheryl Lowry.

The It’s Time Organization makes grants to nonprofit organizations that work to alleviate violence in neighborhoods in the South Side of Chicago.
Jean Cozier, a longtime Trust donor, draws on her positive energy to tackle a taboo topic that she is all too familiar with. A survivor of childhood sexual abuse, Cozier uses her donor-advised fund at the Trust to support the Awakenings Foundation, an organization she founded to help victims of sexual abuse and rape use art to heal from their trauma, while bringing awareness to the problem. The Awakenings Foundation supports the healing of survivors of sexual abuse and rape as they explore their feelings through artistic expression, such as painting, writing, and music. The foundation’s center and gallery in Ravenswood provides a safe haven for these artists to share their stories and showcase their work.

Cozier and her attorney worked with the Trust staff for about a year to create Awakenings as a private operating foundation, which allowed her to fund the foundation through her donor-advised fund. Since opening in 2010, Awakenings has cultivated a nurturing environment for many local artists, musicians, and writers to create and share their work. In addition, Cozier supports other nonprofits and programs that offer healing and advocacy services through her fund. By working with the Trust to administer her donor-advised fund, Cozier can devote more time to carrying out Awakenings’ mission.

Since opening in 2010, Awakenings has cultivated a nurturing environment for many local artists, musicians, and writers to create and share their work.
The Greater Cincinnati Foundation

Growing up in rural Alabama after the Great Depression, Don and Laura Harrison were academic rivals. Both were sharp students who dreamed of attending college. For Laura, the youngest of seven children, it was even more of a challenge. Laura worked for a year at her former high school and met a recruiter who helped get her to the University of North Alabama. She worked through college and married Don during his first year of medical school.

That determined young girl is now part of a dynamic pair that helps others, particularly in the area of education. Through their donor advised fund at GCF, Don and Laura support programs and scholarships at their alma maters, as well as area nonprofits. The Harrisons set up their fund with one goal in mind: to pass on the opportunity to someone from a similar background who is really eager to go to school and does not have the means to do it. This passion for education led the Harrisons to visit Lower Price Hill Community School and grew into an interest in the entire Price Hill neighborhood, including BLOC Ministries.

Doris Leonard, a native of Bethel, Ohio, was an only child raised by Depression-era parents. She grew up with the attitude that whatever you have, you give back. For 25 years Doris worked at Bartlett & Company as assistant to Chairman Bill Friedlander. When Bill was appointed GCF's Volunteer Director in 1990, he brought Doris with him, where she got to know the Foundation and the community. More than 20 years later, she’s still interested in the work of the community foundation. When Doris found herself with extra assets, she turned to GCF for help.

Doris opened a donor-advised fund so she could give to the areas she’s passionate about, including education, children, and senior citizens. She also felt strongly about supporting the Weathering the Economic Storm Fund, established last year during the economic downturn. Not only did this collaboration remind her of how people helped each other during the Depression, but she was also impressed that a group of foundations and corporations were pooling resources and making decisions together. Doris plans to give back ever after her death, when her fund will turn into an unrestricted fund and increase in value through a bequest.

The Harrisons set up their fund with one goal in mind: to pass on the opportunity to someone from a similar background who is really eager to go to school and does not have the means to do it.
Dwight Smith is the founder of an IT consulting business he created in Columbus, Ohio. He created a donor-advised fund called the Thanks Be To God Foundation to support local causes he is passionate about. Dwight decided to take on Mount Kilimanjaro, and in doing so, raise money to support causes and nonprofits that have an impact on children. Dwight said, “I decided to climb only if I could raise money for kids in our community.” Through his involvement in the community, the use of his DAF, and the various relationships he had cultivated with the staff of The Columbus Foundation, Dwight had a greater understanding of the community’s needs and where grants to youth could be used most effectively. His climb helped leverage over $60,000 in gifts, with recipients including Big Brothers Big Sisters, Fellowship of Christian Athletes, Cedarville University, and A Kid Again.

The community improvement projects Jack and Zoe Johnstone have led over the years can be seen all around central Ohio. In 2007, Jack and Zoe established their second Donor Advised Fund, the Johnstone Fund for New Music, to create a new philanthropic endeavor to support their love of new art music, and increasing access such music throughout the community. The Fund supports the continuing growth and vitality of extraordinary, contemporary concert music for the benefit of the central Ohio community. The fund connects composers with local nonprofit performance groups, which collaborate and perform new music for the benefit of the broader community. Grants from the fund range from $500 to $7,500, and are available to local nonprofit performance groups. “There’s this incredible wealth of talent and interest spreading now throughout our community. We’d like to use and see our donor-advised fund be a catalyst for Columbus being considered a center for new music,” says Jack Johnstone.

Anne Powell, Ann and Bill Wolfe, Beth Crane and several other donors to The Columbus Foundation established the Green Funds to support responsible use of natural resources and to ensure their availability for future generations. The Fund seeks to create awareness of local conservation issues and to nurture a community that supports greater stewardship of natural resources and understands the economic benefits of conservation. Particular emphasis is placed on sustaining biodiversity and natural habitats, protecting rivers and watersheds, supporting existing parklands and green spaces, and addressing human health needs through environmental initiatives. Over ten donor advisors have been involved with this fund since 2001, and more than $143,000 has been granted to local nonprofits during that time.

Dwight Smith decided to take on Mount Kilimanjaro, and in doing so, raise money to support causes and nonprofits that have an impact on children. Dwight said, “I decided to climb only if I could raise money for kids in our community.”
Dan and Joellyn Smith were always strong proponents of helping those in need. They established the Smith Family Fund as a way to pay their prosperity forward. After Joellyn passed away from breast cancer, Dan created the Joellyn Smith Fund for Breast Cancer Support. This fund supports the Bridge Breast Network, to provide practical support to low-income uninsured women. Joellyn Smith made philanthropy a priority in her life. Thanks to her loving family and support from Communities Foundation of Texas, she is still giving back today.

Before there were Morton’s Potato Chips, there was Granville C. Morton, honing his potato chip recipe in the kitchen of his Dallas sandwich shop. He ultimately sold the store to manufacture the chips and made his fortune years later when the company joined General Mills. Morton gave to many causes throughout his life, including $1 million in 1965 to help build a cancer and research hospital. Today, his granddaughter Meredith Woodworth advises on grants from the Morton Fund at Communities Foundation of Texas, which has granted $23 million since 1982 to such nonprofits as the American Red Cross, Ability Connection of Texas, Dallas Baptist University, and Dallas Children’s Advocacy Center.

Business lawyer Mike Tankersley hires lawyers who will never work a single day for him. He and his wife, Karen, also an attorney, approached the Communities Foundation of Texas seeking to translate their business law practices into courtroom assistance for the less fortunate. The foundation helped them set up a donor-advised fund providing two years of support for a new, full-time lawyer at Legal Aid of Northwest Texas.

After Joellyn passed away from breast cancer, Dan created the Joellyn Smith Fund for Breast Cancer Support.
The Dayton Foundation

A donor-advised fund established at The Dayton Foundation was started by a family-owned company in order to give back to a small community where they live and work. A very significant grant that has been made from the fund is to support the construction of their school district’s new football stadium complex and wellness center. The district’s leaders solicited and received pledges for the construction of the complex.

At the same time, the district also entered into a credit arrangement with their local bank to finance the construction before all pledges were received. In order to reduce the financing costs for the construction of the project, the advisors to the fund at the foundation agreed to advance a sum of over $2.5 million without interest to pay the balance of the loan and to allow the school district to repay the advance without recourse. This is a great example of a donor using their assets in a DAF for community good.

Community Foundation of Greater Des Moines

The Lohse family’s donor-advised fund at the Community Foundation of Greater Des Moines is spurring activism in the community. When the Lohses began working with the Community Foundation, they were looking for a way to support the community in meaningful ways. The Foundation helped determine where the family’s values and areas of charitable interest intersect, in order to focus their charitable giving. Through the Foundation, the family has been able to visit a variety of area nonprofits.

The Lohse’s daughter was inspired by the services provided to at-risk preschoolers at one of the organizations they visited, and thanks to the family’s donor-advised fund she was able to provide a grant to help kids close to her own age. The Lohse family’s donor-advised fund is growing more than charitable assets, and it is one example of how the community foundation plays a role in developing charitable leaders.

A very significant grant that has been made from the fund is to support the construction of their school district’s new football stadium complex and wellness center.
The Envision 2010 community visioning process identified the need for a community health center in 2005. The Schmid family helped make that a reality with their $1.3 million gift from the family’s donor-advised fund at the Community Foundation of Greater Dubuque. Their gift creates an endowment that provides annual operating funds for the Crescent Community Health Center. Schmid family members Janet Rhomberg and Mary Schmid feel grateful that they are able to share their blessings. With such a great need for affordable health care in the community, they helped establish a facility that is providing a much-needed service. Mary Schmid says, “I’ve never had to think twice about calling a doctor for my children. When you realize there are people who don’t have that option, it makes you want to do what you can to help.” Dedicated to providing high-quality and affordable health care, Crescent serves uninsured patients with a sliding fee scale and provides discounts based on household income and size.

When Bud Johnson moved to Monticello, Iowa 31 years ago, he had little more than a U-Haul truck and an idea to establish the Iowa branch of MinnTex Citrus, an already budding company that started two years prior in Windom, Minnesota. Bud believes in the importance of giving back and creating a legacy and he credits Monticello with fueling his success. He wanted to see his community thrive, so with the help of the Jones County Community Foundation, Bud and his wife Georgia started the Monticello Youth Baseball and Softball Association Fund (MYBSA). The MYBSA is focused on building confidence, self-esteem, and enjoyment of sports through participation in baseball and softball.

Mary Schmid says, “I’ve never had to think twice about calling a doctor for my children. When you realize there are people who don’t have that option, it makes you want to do what you can to help.”
Robert (Bob) Beswick settled in the small town of Antioch on the Sacramento River after working in a paper mill while a student at UC Berkeley. His wife Sharon was raised there from the age of two. Strengthening the Antioch community became a passion for each of them. Bob had a successful insurance practice and had long given to organizations that helped single mothers working to improve life for their families. As a nurse at a major hospital, Sharon had a keen interest in elders through her volunteer work with nursing homes.

The Beswicks turned to the East Bay Community Foundation to help identify ways to help shape the community they care so deeply about. They established several funds, including a donor-advised fund, each focused on a particular issue or nonprofit, and named one the “Antioch Community Fund.” After Bob’s passing, Sharon began working closely with the Foundation, seeking advice about high-quality community groups within her areas of focus. Her philanthropy has helped sustain health- and senior-focused nonprofits, a local job-training nonprofit, and a number of civic groups.

Sharon’s strong interest in preserving and sustaining the community spirit of the town led her to become a leading funder of the restoration of the historic El Campanil Theater in the center of town. Her work attracting other donors, and securing the theater’s new vitality led the Antioch Chamber of Commerce to honor her with a Lifetime Achievement Award in 2009. The East Bay Community Foundation helped the Bewsicks multiply their impact in the community in a meaningful way, and create a lasting legacy for generations to come.

Sharon’s strong interest in preserving and sustaining the community spirit of the town led her to become a leading funder of the restoration of the historic El Campanil Theater in the center of town.
Erie Community Foundation

Nearly fifteen years ago, Bob and Kathleen Frenzel established a donor-advised fund at the Erie Community Foundation to support smaller charities for neighborhood beautification. As their endowment grew, they expanded their giving to provide children’s shoes at the Kids Cafe, meals for the homeless at Emmaus Ministries, a second chance for residents at House of Healing and eye exams at St. Paul’s Neighborhood Free Clinic. They have supported the Bayfront Center for Maritime Studies, Holy Trinity Lutheran Church, the Hispanic American Council and Sisters of Saint Joseph.

These are a few of the many charities touched by the Frenzels’ generosity. The Frenzels believe that they were taught to give. When Bob was younger, his father established a family fund in his hometown of St. Paul, Minnesota. Today, the 3rd and 4th generations manage the fund. The Frenzels’ four adult children, Sarah, Tom, Heidi and Mike, live in Florida, Colorado, Virginia and South Carolina respectively.

Fresno Regional Foundation

When an earthquake devastated Haiti, Martin and Marianne Weil knew they wanted to make a donation right away. They talked to the staff at the Fresno Regional Foundation, and a donation was sent from their donor-advised fund to Doctors Without Borders, an international humanitarian organization that renders medical assistance around the globe.

Their involvement with the Foundation is fairly recent, but the list of organizations that they have supported is quite large and includes the Fresno Art Museum, the Sierra Chamber Opera, Children’s Hospital Central California, the City of Hope, and CSU Fresno Summer Arts. Their donor-advised fund within the Fresno Regional Foundation allows them to stay involved in their charitable giving and also remain flexible in how the money is used.
Hawaii Community Foundation

Dr. Frank and Laura Sayre established the Daniel Robert Sayre Memorial Foundation Fund at the Hawaii Community Foundation in 1998, after the passing of their son in a hiking accident in Pololu Valley on the island of Hawaii. Out of their heartache arose the couple’s awareness of the need for critical improvements in emergency operations on the island. Staff from the Hawaii Community Foundation helped the Sayre’s identify causes to support that would memorialize Daniel’s life and express appreciation for the rescue workers who risk their lives every day.

The fund has become instrumental in raising money to purchase specialized rescue equipment, such as site utility vehicles, scuba tanks and portable radios, for the fire department and provide training to prepare emergency responders to serve the community. It also finances an annual recognition dinner where outstanding fire department employees are honored for their extraordinary rescues.

Community Foundation of Tompkins County (Ithaca, NY)

The Bernard Carl and Shirley Rosen Library Fund of the Community Foundation of Tompkins County provides generous support to Seymour Library’s summer reading program including school visits, a major addition to the children’s book collection, and a gift for every participant in the summer reading program.

The Rosen Fund supports projects in several local libraries that promote genuine intellectual curiosity and a lifelong love of reading and learning. Dr. Rosen documented his desire for the fund with specific language in his will and worked with the foundation to identify grantmaking opportunities to promote greater and easier access by youth to local libraries.
David Anderson spent his career in the biopharmaceutical industry and became interested in working toward improving the health care opportunities within impoverished countries. As a donor at the Greater Houston Community Foundation for over ten years, his donor-advised fund was instrumental in supporting these and other philanthropic interests. In 2012, the foundation presented Mr. Anderson with an opportunity to become an investor in a unique philanthropic idea, the Global Health Investment Fund (GHIF).

In collaboration with the Bill & Melinda Gates Foundation, J.P. Morgan, and Lion’s Head Global Partners, GHIF seeks to provide affordable funding to support the development of drugs, vaccines, preventatives, diagnostics and other products to address global health challenges that disproportionately impact developing countries. This opportunity allows Mr. Anderson to invest resources alongside the Gates Foundation and leverages their expertise in creating the potential for a much larger impact.
In 1998, Eugene (Gene) and Marilyn Glick established the Glick Fund, a permanent donor-advised fund at Central Indiana Community Foundation. Gene and Marilyn served as the advisors to the Glick Fund for the first ten years. In 2008, as a result of encouragement from the Foundation staff and declining personal health, Gene and Marilyn made the decision to transfer fund-advising responsibilities to their four adult daughters, select Gene B. Glick Company employees, and additional family members. At the time, the second generation of advisors did not know that assuming advising responsibility of a permanent donor-advised fund would result in a new commitment to civic engagement.

The Glick Fund now serves as the civic engagement catalyst for its advisors. Most prominently, Marianne Glick, the oldest daughter of Gene and Marilyn, has emerged into one of Indianapolis’ most valued civic leaders. Sparked by her experience as an advisor to the Glick Fund, Marianna chaired and co-chaired the most successful United Way campaigns in Indianapolis history and is now leading community-wide efforts to strengthen Indianapolis neighborhoods, improve public education, expand access to the arts, decrease human suffering, and increase self-sufficiency.

Sparked by her experience as an advisor to the Glick Fund, Marianna chaired and co-chaired the most successful United Way campaigns in Indianapolis history and is now leading community-wide efforts to strengthen Indianapolis neighborhoods, improve public education, expand access to the arts, decrease human suffering, and increase self-sufficiency.
Community Foundation of Acadiana (Lafayette, LA)

Brenda and Greg Hamer of Morgan City, LA operate restaurants in Louisiana, Mississippi and Texas. Their business, B&G Foods Enterprises, is the largest Taco Bell franchisee in Louisiana. The Hamers considered starting their own private foundation in 2010, but their attorney instead referred them to the Community Foundation of Acadiana (CFA) for guidance in fulfilling their philanthropic goals. Through working with CFA, the Hamers have set up both a scholarship fund to benefit their employees and a personal donor-advised fund.

The scholarship fund has a unique model. B&G employees contribute to the scholarship fund to enhance it for their fellow workers and their immediate family members. The employees are largely low wage earners, but most contribute a small amount each paycheck to support the fund. B&G matches the employees’ contributions 5:1, so an employee’s $1.00 gift adds $6.00 total to the fund. B&G currently provides scholarships for 16 students who receive $1,000 each semester from the fund. The scholarships are used to pay for the students’ tuition and books at any college, university, trade school, or other postsecondary institution.

Out of their donor-advised fund, the Hamers made 125 grants totaling more than $150,000 in 2014. The Hamers support a variety of local organizations such as their church and diocese, food banks, universities and colleges, and local high schools; as well as and national organizations such as veterans’ and military organizations, research hospitals, and preservation societies. Additionally, Greg is the Chair of the St. Mary Parish Foundation, an affiliate of the community foundation. The Hamers credit the community foundation staff with helping them to maximize the impact of their charitable giving.
Alice Dittman, a retired bank president and former chair of the Community Bankers division of the American Bankers Association, uses her donor-advised fund at Lincoln Community Foundation to create a combination of grants and loans (i.e., mission investments) to a local community development finance institution to start a new microloan program called Alice’s Integrity Loan Fund. The program has now been expanded and is also being used to fund educational programming and to establish a Women’s Business Center in Lincoln. Alice worked in close partnership with the staff of the Foundation to develop her concept and make it operational.

Another donor at Lincoln Community Foundation recently used his donor-advised fund to establish a new technology grant for local nonprofits to hire interns from the University of Nebraska’s Jeffrey S. Raikes School of Computer Science and Management. The donor’s goal was twofold: (1) to make high-quality technology skills available on an affordable basis for local nonprofits; and (2) to give highly-sought-after students greater exposure to the real-world needs and good work of the nonprofit sector. Lincoln Community Foundation staff works closely with the Raikes School to administer the program. The Cintani Technology Internship program is now in its second year.

Inspired by the Vital Signs report, produced by Lincoln Community Foundation in partnership with a dozen other leadership organizations, a group of individuals asked the Foundation to partner with them to do a community engagement and urban planning study focused on one of Lincoln’s high-poverty neighborhoods. The donors started a fund at the Foundation and invited other institutions to contribute. The fund is currently paying for the studies about the area south of Lincoln’s downtown (“Sodo”).


The program has now been expanded and is also being used to fund educational programming and to establish a Women’s Business Center in Lincoln.
In 1999, Dr. Ruth Goldman retired as Professor of Psychology at San Francisco State University. She and her husband, Dr. William Goldman, Clinical Professor of Psychiatry at the University of California, San Francisco, took all of the energy that they had devoted to their careers and directed it toward the next generation of students. Their goal was to ensure that future leaders reflect the true diversity of our culture. The Goldman’s established a donor-advised fund at Marin Community Foundation, which created the New Leader Scholars program to provide financial aid, mentoring, community networking, health assistance, graduate school preparation assistance, and career guidance to nearly 100 students who have transcended enormous obstacles in their lives.

Many of the students are the first in their families to attend college, and they have demonstrated the inner strength to survive overwhelming family, financial, health, or community conditions. The Scholars program is a great example of how donors used the tools of the community foundation to achieve greater impact than they would have been able to on their own.
Community Foundation of Greater Memphis

When Anita and Ray Pohlman opened a donor-advised fund in 2014, they chose to name it the Nene and Hooray Fund. Their grandchildren lovingly bestowed the names upon them, although there is ongoing family debate about the correct spelling. Anita and Ray wanted to establish the fund to help the entire Pohlman family affirm their commitment to philanthropy and community, so the name just made sense. Ray, a nearly lifelong Memphian and Vice President of Government and Community Relations at AutoZone, wanted to start building their charitable funds for use in the years following his retirement. His job at AutoZone exposes him to many of the overarching issues facing our community. His wife Anita knew that the Community Foundation would help them learn about smaller, more grassroots organizations serving the causes they want to support.

Both Anita and Ray have long been civically minded and understand the importance of being strategic with both the funds they set aside for charitable giving and the grants they make to the community. The Community Foundation helps them do that in a thoughtful way, and allows them the flexibility to incorporate the wishes of their entire family. Through their DAF at the Community Foundation of Greater Memphis, the Pohlmans are currently supporting The Works, Inc., which strives to rebuild, restore, and renew families in that community through housing, economic development, and social services; and New Ballet Ensemble, which seeks to train and mentor young dancers from every part of the community, regardless of socio-economic status.

Jerrold and Martha Graber have been working with the Community Foundation of Greater Memphis for almost two decades. Jerrold, a retired securities broker, chose the Community Foundation for his personal giving, and also often recommended the Foundation’s services to his clients. The Grabers like the fact that they can give to their favorite local organizations through a Memphis-based nonprofit, and they especially appreciate that the Foundation keeps them informed about groups and initiatives that they might not otherwise know about.

For example, the Foundation introduced the Grabers to the work of REACH Memphis several years ago. The REACH program enables public high school students to reach new heights by transforming a summer program experience into a college preparatory one, with boarding schools and colleges participating from all across the United States. In addition to currently serving as a REACH Memphis board member, Jerrold has served as an officer and helped with several activities, including conducting student interviews. The Grabers have also used their donor-advised fund to support the Foundation’s Community Partnership Fund. By supporting that fund, they take advantage of the staff and volunteer grant committees at the Foundation, and help direct financial support focused on building capacity of area nonprofits and projects of broad significance in which they might not otherwise have the opportunity to participate as individual donors. In their time with the Foundation, the Grabers have made over 400 grants that strengthen the local community.

The Pohlmans are currently supporting The Works, Inc., which strives to rebuild, restore, and renew families in that community through housing, economic development, and social services; and New Ballet Ensemble, which seeks to train and mentor young dancers from every part of the community, regardless of socio-economic status.
Gary and Judy Jorgensen are two pillars of the Greater Milwaukee Community, serving on a variety of boards and campaigns, including Judy’s 10-year service to the Greater Milwaukee Foundation Board. Gary is the Chairman of the Board of VJS, one of Wisconsin’s Top 10 general contractors, construction managers, and design builders. Judy is also a retired Department Head at the Waukesha County Technical College. In 2008, they started a donor-advised fund at the Greater Milwaukee Foundation because they wanted to give back to the local community. They started out by making grants to organizations like Hunger Task Force and Feeding America, but they realized that they could use their donor-advised fund to pass on the values of giving back to their grandchildren. The way their fund is set up, grandchildren can join the grantmaking table at age twelve and participate all the way through college. The grandchildren identify projects and organizations they want to support, present their proposals to each other, and make final decisions as a group.

Projects supported by the Jorgensen Family Fund include: special carts for Children’s Hospital that help transport patients in child-friendly fashion, as alternatives to wheelchairs; school programs for Urban Ecology Center; and school supplies for The Women’s Center-Waukesha. Another project provided seed funding for the Medical College of Wisconsin’s Eye Institute – Advanced Ocular Imaging Program, which the kids experienced first-hand during a site visit. All told, the Jorgensen’s and their grandchildren have contributed $37,000 to 53 local charities since the inception of their fund.

Bill Krugler has been deepening his engagement in the central city since his semi-retirement from Mason Wells, a private equity fund in Milwaukee. Bill began by working with the Foundation’s program staff to explore several models of supporting holistic workforce development programs as well as programs which support economic development in mostly minority neighborhoods. After learning more about Milwaukee’s nonprofit community and participating in other charitable efforts throughout the country, Bill and his wife Christy created a donor-advised fund at the Greater Milwaukee Foundation in 2012.

Through the donor-advised fund, Bill has supported the Milwaukee Business Collaborative, which works in two ways to create wealth in central city communities around Milwaukee’s Lindsey Heights neighborhood: first by helping create employment for individuals with multiple barriers to engaging in the workforce; and second by supporting small minority-owned businesses build their capacity. The Business Collaborative bids on work and secures contracts for things like janitorial services with anchor institutions (hospitals and universities), which can then hire employees from the neighborhood to work. The Kruglers also have involved their three boys, who will be the successor advisors to the fund to educate them about philanthropy and the family’s role in making a difference. Working with the community foundation staff helps the Krugler’s maximize the impact of their charitable dollars, and brings new ideas to them that they might not have been able to find on their own.

The way the Jorgensens’ fund is set up, grandchildren can join the grantmaking table at age twelve and participate all the way through college. The grandchildren identify projects and organizations they want to support, present their proposals to each other, and make final decisions as a group.
Minneapolis Foundation

In 1988 a family set up a donor-advised fund at the Minneapolis Foundation to support charities working to address the needs of young people — especially those aging out of foster care. When the fund was initially set up, the family and the foundation discussed grant opportunities specifically designated for working with this population. The family created a micro-grant fund, known as the “Springboard Fund,” to provide small cash grants to young people who were taking responsible steps toward independence. This example illustrates the unique value of a community foundation: its ability to develop a relationship with a donor over time, understand that donor’s charitable motivations, and engage with the right nonprofit organization to create a new program that brings together the interests of the donor and those of the nonprofit partner.

A couple in their 70s established a donor-advised fund in 2002 at the Minneapolis Foundation to support dance performance and health research. The couple named their four adult children as successor advisors and embarked on highly engaged community giving. Their signature gift, in 2011, was in the form of a grant for the renovation of a designated stage for dance, as part of the restoration of the historic Schubert Theater in downtown Minneapolis. In addition to a sizeable grant, the family made a Program Related Investment through their Fund to support the same project. Through these gifts, what started as a simple DAF 13 years ago has resulted in significant civic benefit.

The family created a micro-grant fund, known as the “Springboard Fund,” to provide small cash grants to young people who were taking responsible steps toward independence.
In 2005, a local family that wishes to remain anonymous opened their first donor-advised fund with the Minnesota Community Foundation. After working with the Foundation staff for several years and seeing the possibilities of local philanthropy, this family started an additional DAF in 2011 called the Transformational Fund. They wanted to collaborate with the Foundation’s program staff to identify organizations where they could make a “transformational” impact with a large, one-time grant. Each year, the staff organizes an RFP for the family around an issue area they care about, helps vet proposals, participates in site visits, and then grants up to $500,000 to the chosen organizations. This is a multi-generational effort for this family, which has mentioned on several occasions that this is something they would never have been able to do on their own. Rather, it was only through this collaboration with the community foundation that they were able to have this level of strategic local impact on nonprofit organizations whose missions they support.

When Clifford C. Sorenson died in 1995 at the age of 91, his will established two funds at The Saint Paul Foundation. One was a charitable trust providing income for his daughter, Carolyn, for the rest of her life. The other was a donor advised fund on which Carolyn advises. Carolyn has shared how rewarding this has been for her, as her father could have simply directed the money to charity at his passing. Instead, by establishing these funds at the community foundation, particularly the donor advised fund, it has allowed Carolyn to develop a love for philanthropy and she has been able to think strategically about how to best honor her parent’s charitable legacy while at the same time establishing her own. Some of the local organizations that Carolyn has chosen to support with the Foundation’s guidance include Habitat for Humanity, The Nature Conservancy, and the Saint Paul Como Conservatory. These organizations help honor her parents’ love for the outdoors and their focus on environmental issues. The Foundation’s staff has also helped her become personally engaged with the organizations that she supports.

Each year, the staff organizes an RFP for the family around an issue area they care about, helps vet proposals, participates in site visits, and then grants up to $500,000 to the chosen organizations.
The Neil and Louise Tillotson Fund, a donor-advised fund at the New Hampshire Charitable Foundation, has systematically increased civic engagement in the communities it serves. More than 20 area residents are advisors to the fund, acting as strategic grantmakers and responsible stewards. One grant from the fund helped create the Coos Symposium, with nearly 500 members from the public and private sectors. The Symposium’s network of individuals and communities is working to build vitality in the area.

The Tillotson Fund has also supported a broad collation that has implemented coordinated strategies and services for crucial early childhood development. The fund has also invested in economic development measures, such as supporting the creation of a local wood products energy economy. The fund also engages members of the community in a variety of issues online, and supports a youth awareness project working on innovative ways to connect the youth of region more deeply with the community. The Tillotson Fund is a great example of how a single donor-advisor (or a simple family) can use a DAF at a community foundation to deepen their commitment to the community in a variety of ways.
Todd Ouida suffered from a debilitating anxiety disorder as a child, unable to attend school for nearly three years. More than 20 years later, his parents are trying to help other children with similar problems. Herb and Andrea Ouida established the Todd Ouida Children’s Fund at the Community Foundation of New Jersey in late 2001 in honor of Todd, a New Jersey native and Cantor Fitzgerald foreign-currency options trader, who died at age 25 in the September 11 attacks. Using Todd’s successful fight against childhood anxiety as inspiration, the Fund supports psychological services for children of families in need and works to remove the stigma of depression. Through this donor advised fund, the Ouida family has supported treatment facilities for abused and neglected children, an art-therapy center, and a summer camp for children who lost loved ones on September 11th, as well as the University of Michigan Depression Center where Todd was an alumnus, majoring in psychology.

A special focus of the Ouidas and their donor advised fund has been a program called Zippy’s Friends, which helps children ages 5 to 7 develop coping skills when faced with situations that breed anger or sadness. Earlier this month, the Fund gave $10,000 to train 26 New Jersey teachers in Zippy’s Friends curriculum, matching a grant from the United Water Foundation and adding to a contribution from the Teaneck Board of Education. The Ouida family connected the founders of U.K.-based Zippy’s Friends with the Youth Consultation Service’s YCS Institute for Infant and Preschool Mental Health, based in East Orange, N.J., which now oversees the program in the U.S. The Todd Ouida Children’s Fund has donated more than $40,000 since Zippy’s Friends launched in the U.S. in early 2007, and it is now in a dozen school districts across New Jersey and two schools in New York City.

Using Todd’s successful fight against childhood anxiety as inspiration, the Fund supports psychological services for children of families in need and works to remove the stigma of depression.
When Nancy and Jay Talbot moved to New York City, they were confronted with an overwhelming number of opportunities to become involved in their new community. Trying to engage in a new city, especially one the size of New York, can be daunting. Jay had a long career in neighborhood development and urban issues, and worked at another community foundation for 23 years. Knowing first-hand that community foundations know about their hometowns, the Talbots set up a meeting with the New York Community Trust to figure out the best ways to make an impact.

The senior donor services staff at the Trust were key guides for the Talbots. They introduced them to extraordinary nonprofits and wonderful, dedicated people; as a direct result of the staff’s personal engagement, Nancy is now involved with the Mt. Sinai Adolescent Health Center. Jay, who is particularly interested in getting people connected in their neighborhoods, volunteered with a Trust project that enlists older adults and teens to bring fresh produce to lower income neighborhoods, by buying it wholesale and selling it at affordable prices. Using his long experience with nonprofit start-ups, he helped get a project in upper Manhattan off the ground, and he is still volunteering.

Nancy and Jay use their donor-advised fund at the trust to support nonprofits making a difference. The Talbots are regulars at donor briefings, where the Trust bring in outside experts to illuminate City issues and offer suggestions for how donors can help. These briefings bring in high-level, talented speakers in an informal, intimate settings which help Nancy and Jay identify new opportunities and ways to give back.

Jay Talbot, who is particularly interested in getting people connected in their neighborhoods, volunteered with a Trust project that enlists older adults and teens to bring fresh produce to lower income neighborhoods, by buying it wholesale and selling it at affordable prices.
For the past five years, the Community Foundation of Western North Carolina has been working with a couple whose philanthropic lens was initially focused on low-income children. Foundation staff worked intentionally to understand their goals and served a research and development role for these donors. Drawing on their regional knowledge, the foundation staff presented funding opportunities based on research and knowledge of the donors’ passions, resulting in an expansion of the organizations and areas of interest they funded.

Over five years, the donors put $4.1 million into their donor-advised fund. From 2006 to the present they have granted out over $2 million – nearly a 50 percent payout of the original amount – to nearly 40 different organizations in the community. The programs supported by the fund include early childhood development, school success, arts, the environment, and economic development. The couple says, “If you want to participate and be involved in your community, then there’s really only one alternative, once you make that decision. This Community Foundation, to us, is an avenue to our community and it’s an avenue to help us find opportunities and to know what this community needs and how we can help it.”

This relationship built on mutual trust has enabled the Foundation to help these donors give back in meaningful, unique way. In the next month, they will close on a farm property that they have purchased, with non-charitable funds, to support beginning farmers by providing access to land in an area where land values are often a barrier to new or expanding farm efforts. Their long-term goal is to preserve the property through a conservation easement, but in the interim they plan to partner with a local agency already working with farmers focused on a local sustainable food system. This is a new approach to an existing problem and could become a model program and as a result the goal of the donor is met, the needs of the region are addressed, and the benefits of philanthropy are extended.

George Cecil, a third-generation member of the George W. Vanderbilt family and Chairman of Biltmore Farms, and his son Jack opened funds at the Community Foundation of Western North Carolina that would grow through sales at Biltmore Lake and Ramble Biltmore Forest. The company seeded the funds with the initial land transfer, and successive sales of residences have added to that amount. The Ramble Charitable Fund has awarded grants to Enka-Candler public schools since the 2008 recession and has served as a beacon of hope for local students and teachers in an otherwise dismal financial environment. Both funds have contributed to innovative and creative approaches to classroom learning, particularly in vital areas such as technology, science, and math. The funds allow the company to give back and actually embed local philanthropy into their business model. “We wanted a charitable vehicle that would continue and build over time,” said Jack. “We asked local residents to serve as advisory board members to encourage community involvement and effective grantmaking.” The Ramble and Biltmore funds have allowed the Cecil family’s history of giving to continue with convenience, and the professional support provided by foundation staff.

Both of the Cecil family’s funds have contributed to innovative and creative approaches to classroom learning, particularly in vital areas such as technology, science, and math.
Community Foundation of North Texas (Ft. Worth, TX)

Many homeless dogs and cats arrive at the City of Fort Worth shelter with injuries and illnesses that make them unadoptable and likely candidates for euthanasia. In addition, a shelter full of animals with unknown medical histories makes it difficult to prevent illness from spreading. The Community Foundation had been working with a donor advisor, Jean Walker, for some time on small grants to animal rescue groups. The Foundation realized Jean would be very keen to make a difference on a larger scale. In addition to Jean’s substantial grant, the Community Foundation brought other donors and private foundations together to fund, develop, and build the first medical treatment center at a municipal animal shelter in North Texas. The $1.2 million, 4,600 square-foot center was then given to the City of Fort Worth. Approximately 2,400 animals will be saved each year through this gift, and it all started with Jean Walker’s need to save abused and homeless pets.

Research indicates that exposure to the arts has lasting academic benefits for students. However, due to tight educational budgets, the arts often take a back seat to other activities and coursework in the public school system. John and Frances Wasilchak established a donor-advised fund at the Community Foundation of North Texas that brings Fort Worth Symphony Orchestra (FWSO) musicians to the Glen Rose School District each year. Between family concerts, master classes, and trips to Fort Worth’s Bass Performance Hall, students have up to 30 opportunities to be exposed to the FWSO over the course of their academic careers. In addition to instilling a love of the arts, the Wasilchak’s gift prepares students for greater success in the 21st century. This donor-advised fund will transition into an endowed fund at the death of both donors and the Foundation will continue the Wasilchak’s musical legacy for generations to come.

Approximately 2,400 animals will be saved each year through this gift, and it all started with Jean Walker’s need to save abused and homeless pets.
The Community Foundation for **Northeast Florida**

**In 2005, the staff and Board of Trustees of the Community Foundation for Northeast Florida recognized the pressing need for systematic change in Duval County public schools.** They determined the change must come from within the school system and from the community at large. Capitalizing on their role as convener, catalyst and funder, the foundation committed to engaging the community, using data-driven research, and investing $2 million to jumpstart an end to the achievement gap.

Nearly ten years later, the foundation has engaged thousands of citizens, sponsored vital outside research to spotlight where efforts should be focused, and created the Jacksonville Public Education Fund, an independent non-profit with a mandate to use research to mobilize the community and advocate for quality education. The foundation also created *Learning to Finish*, a national dropout prevention collaborative.

In partnership with a small group of deeply committed donors with donor-advised funds, the foundation launched a $50 million QEA Advised Fund to create and nurture great Duval County public school teachers and leaders. Of the original five donors to the QEA Fund, four had existing advised funds with the Foundation. The QEA Fund is structured with an advisory committee – as such, these donors are not just investing their dollars ($5 million each) but are fully engaged in the grantmaking process, meeting regularly with our Superintendent, Jacksonville Public Education Fund staff, and Foundation staff; reviewing data; making recommendations; and studying impact report. In addition to these five donors, seven donors with funds at the Foundation have committed significant dollars from their advised funds to the QEA Fund.

While this is not an example of how a single donor used their DAF to deepen their level of civic engagement, it does show the power of community foundations to use DAFs in a strategic way to leverage results for the community that an individual donor would not have been able to accomplish on his or her own.

The foundation has engaged thousands of citizens, sponsored vital outside research to spotlight where efforts should be focused, and created the Jacksonville Public Education Fund, an independent non-profit with a mandate to use research to mobilize the community and advocate for quality education.
Marilyn Myers, a former employee of the Oklahoma City Community Foundation, established a donor-advised fund during the time that she worked for the foundation. She was able to support several local organizations, including Oklahoma Children’s Theatre and the Harn Homestead Historical Museum, with the annual earnings on her original gift. Following her death, a bequest in her trust added to this fund. She left instructions that a percentage of the annual earnings would continue to support these two organizations, as well as two other charities that were included in the fund agreement when she established the fund. Memorial gifts from friends and family went to this fund, as have other gifts in her memory over the past several years.

By setting up a DAF at a community foundation, Marilyn was able to support organizations she cared about during her lifetime and also leave a permanent legacy to benefit the local community after her death. Permanent advised funds, like the one set up by Marilyn Myers, provide donors with the ability to accomplish both current and perpetual charitable goals.
Every Thanksgiving, Bill and Sally Hanley gather with their family to eat, talk, watch football, and review their family mission statement. Using their mission statement as a guideline, the Hanleys are dedicated to giving back to the people, communities, and organizations that have benefited the careers and lives of their family. The family’s mission statement is intentionally broad, to match their diverse backgrounds. Bill grew up in Indiana, graduated from Purdue University and married Sally, also an Indiana native and an elementary school teacher. Bill joined the Marines and after three years in the service, he attended Harvard Business School. Bill then moved to Omaha in 1978 to buy a Cummins Engine franchise, which sells and services engines for agriculture and industry.

The Hanleys annual Thanksgiving review of their mission statement leads directly to a discussion about where to contribute funds during the coming year. The family conducts its giving through a donor-advised fund at the Omaha Community Foundation, which allows the family to give grants to their charity of their choice. With the Omaha Community Foundation’s help, Bill has endowed a professorship in his wife’s name at Purdue University, supporting a professor position at that institution forever. The Hanleys also support Children’s Hospital of Omaha, where Bill has served on the Board of Directors for 18 years, Countryside Community Church, and the Omaha Children’s Museum.

The Omaha Community Foundation has assisted the Hanley family in the creation of their mission statement, identification of organizations that fit within their giving parameters and providing detailed research as requested. By using their donor-advised fund, Bill has been able to streamline and simplify his philanthropy to charities of his choice and carry on the Hanley family name. One day, Bill’s sons will lead the family meetings at Thanksgiving and advise the Omaha Community Foundation on where to direct the Hanley Family Funds.

The Hanleys annual Thanksgiving review of their mission statement leads directly to a discussion about where to contribute funds during the coming year.
Joan Taylor is a longtime advised fund donor of the Oregon Community Foundation. She is passionate about ending generational poverty, and has worked closely with the foundation and nonprofit leaders to end poverty through parenting education. Over the course of five years, the donor convened multiple meetings in the Portland area attended by key stakeholders, including foundation staff, to brainstorm ways to end generational poverty. As a result of these meetings, the donor recommended using the fund she created to support parenting education classes for families who are homeless or are transitioning back into housing.

When it was discovered that there is currently no evidence-based parenting education designed specifically for families who have experienced homelessness, the foundation brought in an expert to develop strategies to better serve homeless families. These strategies were incorporated into a new parenting education curriculum.

Today, due to Ms. Taylor’s persistent, active role and the funding she recommended, three agencies are working together to provide appropriate parenting education to families experiencing homelessness. The agencies are tracking progress, and staff is reporting positive results, including desirable changes in parenting behaviors and attitudes toward their children. The stakeholders intend to share project outcomes with the field in order to help other communities to bring these services to vulnerable families.

Joan Taylor recommended using the fund she created to support parenting education classes for families who are homeless or are transitioning back into housing.
The **Philadelphia Foundation**

A woman established the **Put Your Money Where Your Mouth Is Fund at The Philadelphia Foundation on the recommendation of her wealth manager**, knowing that working with the community foundation allowed her greater anonymity than would be available through a private foundation. The preservation of her privacy allows her to confidently support controversial causes (such as nonprofits that help sex offenders whose victims are children). She spreads her giving to what is current (such as a natural disaster), and whenever she finds a new cause she’d like to support, she turns to The Philadelphia Foundation to help her find an effective nonprofit addressing that concern. “When I’m looking for an organization, they know them all,” she explains. She makes dozens of one-time grants annually, supporting a wide range of organizations in amounts of $2,000 to $7,000, with her cumulative giving to date totaling more than $350,000. She has also made arrangements so that when she passes away, the fund’s resources will be directed to Field of Interest funds whose purposes align with those causes she has supported through the years.

**Dr. Ethel Weinberg initially came to The Philadelphia Foundation to establish a donor-advised fund.** Staff members facilitated a meeting to better understand the specific giving interests of the entire family. After learning that running was a passion of the grandchildren, the Foundation told family members about a nonprofit that helps homeless people by introducing them to the discipline and health benefits of competitive running. Staff members also accompanied her and her grandchildren to a footrace organized by the nonprofit. Impressed by her dealings with the Foundation, she inspired fellow members of the Philadelphia chapter of the Transition Network to establish a giving circle through the Foundation. She set up a third fund with the Foundation to sponsor summer internships at nonprofits, and has also partnered with the Foundation on leading workshops about components of a successful internship experience. She has indicated she will include the Foundation in her estate plans to perpetuate her community support.

**The Koenig Family Charitable Fund started as a fund through a community foundation partnership with Merrill Lynch.** It has supported more than 95 regional, national and international organizations. Sandy and Charles Koenig brought their adult children into philanthropy by designating $5,000 (which later became $10,000) for each child and spouse to grant to whatever matched their passions. One son and his wife chose mostly Mennonite causes, though diverse programs were also explored. Their daughter and her husband selected humanitarian efforts worldwide, such as Shelterboxes from Rotary International and aid to Haiti. The Koenigs often discuss choices and get help from The Foundation in their vetting process, so they know the charities have fiscal responsibility as well as following through on their mission statements. The Philadelphia Foundation gives donors, like the Koenig family, opportunities to learn more about educational programs and participate in networking events that provide wider exposure to the philanthropic community of Philadelphia and beyond.

The Koenigs often discuss choices and get help from The Foundation in their vetting process, so they know the charities have fiscal responsibility as well as following through on their mission statements.
“I can accomplish more through others than I ever could myself,” was how the late Charles Kaufman described what caused his passion for philanthropy to grow to impressive heights after starting a donor advised fund at The Pittsburgh Foundation in 1984.

Kaufman was not born into wealth. He worked as a chemical engineer, and after his retirement in the 1970s, he was inspired by his love of Pittsburgh and had a deep commitment to making it a place that provided opportunities for everyone who lived in the city. He turned to his self-developed talents for investment and entrepreneurship to build wealth and fund a few favorite charities. Kaufman was especially interested in supporting public education, land conservation, and health care directed to Jewish communities in the region. These broad interests led to his decision to set up a donor-advised fund with $100,000. As the years went by, he was successful in his investing, and very impressed with how the Foundation managed his contributions and assisted him in making donations. He expanded his list of charities and added to his fund regularly. Since its inception, the fund has grown to $3.4 million, and has made grants totaling nearly $400,000.

In 2005, Kaufman expanded his philanthropy and underscored his confidence in community-based philanthropy by providing an additional $1.5 million to create the Charles E. Kaufman Foundation at The Pittsburgh Foundation. The goal he set for the Foundation was to create an award recognizing “substantial contributions to science for both the betterment and understanding of human life.” In 2008, when he presented the Fund’s first award of $50,000 to Terry Collins, Thomas Lord Professor of Chemistry at Carnegie Mellon University for his pioneering research in green chemistry, Mr. Kaufman said: “This is my way to give back. I believe this research is going to make a big difference to our world.”

After his death in 2010 at age 97, The Pittsburgh Foundation received a $50 million bequest that now enables the Charles E. Kaufman Foundation to provide one of the biggest grant-making streams for scientific research in Pennsylvania. The story of Charles Kaufman is a great example of how a donor might start out with a single modest fund, but over time the commitment to the community might grow by leaps and bounds. CONTINUED ON NEXT PAGE

Charles Kaufman worked as a chemical engineer, and after his retirement in the 1970s, he was inspired by his love of Pittsburgh and had a deep commitment to making it a place that provided opportunities for everyone who lived in the city.
After long-time Pittsburgher and successful investment manager Neil Alexander was diagnosed with Amyotrophic Lateral Sclerosis (ALS), more commonly known as Lou Gehrig’s Disease, he made a decision to “Live Like Lou.” He wanted to emulate the New York Yankee Hall of Famer who was admired before his diagnosis as “The Iron Horse” for his physical strength, and afterward, for his spiritual strength reflected in his “Luckiest Man on the Face of the Earth” speech. After his diagnosis, Alexander and his wife Suzanne started a fund at The Pittsburgh Foundation, through which they hoped to provide some awareness building and a modest amount of funds to contribute to ALS research and provide support to families dealing with the disease.

Alexander and his growing network of supporters realized quickly that in working with the staff at the Foundation and in developing an intensive publicity campaign, the fund had the potential to do much more than they ever could have imagined. In the four years since its founding, the Live Like Lou Fund (livelikelou.org) has raised more than $1 million. And just one month before his death, Alexander and his family were center stage as the University of Pittsburgh’s Brain Institute announced a Live Like Lou partnership as part of a new $10 million research center.

The Live Like Lou Fund is a true example of how community foundations facilitate collaboration among donors and staff. Donors have the ability to become full partners in thinking through community priorities and problems, and foundation staff can lean from the ideas and experiences of donors.

Neil Alexander wanted to emulate the New York Yankee Hall of Famer who was admired before his diagnosis as “The Iron Horse” for his physical strength, and afterward, for his spiritual strength reflected in his “Luckiest Man on the Face of the Earth” speech.
Racine Community Foundation

A donor-advised fund at the Racine Community Foundation was started in honor of a young man who passed away from leukemia at the age of 13 by his parents and surviving brother. One of the projects the family has supported with their donor-advised fund is a community art project. The art project involves building a mosaic along the Root River in the city of Racine. Community members came together to learn the art form, beautify the city, and remember the young man who passed away.

The family is now planning to fund phase two of the mosaic. The parents of the young man who started the fund were not very wealthy, but their friends helped contribute to the donor-advised fund, and the family in turn has been able to use funds to support beautifying the city in their son’s memory.

Rhode Island Foundation

If a particular donor-advised fund at Rhode Island Foundation, created in 1988, did not exist or had been closed down in its early years, Providence would likely have 10,000 fewer street trees; a vastly different urban tree canopy adversely affecting the aesthetics and environment of the city for its residents and businesses.

Studies have been able to show approximately how much energy is saved, how much air pollution is trapped, how much storm water intercepted, and how much carbon is stored by Providence’s street trees. This fund engages folks well beyond the donor family. Since its creation, there have been 689 additional gifts by more than 340 donors, greatly engaging members of our community in philanthropy and community service. In addition, more than 200 volunteers annually perform this community building work together. Through the Three Fund, the leadership of the donor-family, and the reach and connections of the Rhode Island Foundation, a city landscape has been transformed. This donor advised fund is the philanthropic engine for an important environmental and fiscal benefit to the state’s capital city.
An anonymous donor who holds a lifelong passion for giving back – but until her late father’s passing did not have the ability to make an impact financially – was first inspired to give while attending a dedication ceremony at her father’s alma mater. The experience led her to consider her own legacy, and she met with staff from The Community Foundation Serving Richmond and Central Virginia. Soon after establishing a donor-advised fund, she attended the Big Give, hosted by Impact 100 Richmond, one of three giving circles administered in partnership with the Community Foundation.

The giving circle introduced her to the YWCA of Richmond’s plans to provide housing for women with children who have been victims of domestic or sexual abuse. The donor thought of her friend, who entered a shelter with her mother at the age of 7 and still vividly remembers the experience. The donor advisor was heartened by the YWCA commitment to remove women from a shelter environment (where interaction with other victims perpetuates the trauma of their situation) and provide them with the security of their own home. In apartments rented by Better Housing Coalition, clients and their children can integrate into their community without being identified as victims.

Days after the Big Give celebration, the anonymous donor was compelled to do something more. She decided to take the proceeds from the home she was selling to create a new endowment at the Foundation to provide ongoing, annual support to the YWCA for the housing program. She has taken the time to meet with the leaders of the YWCA to share her inspiration and vision for the endowment. While sharing the news, she recognized that while her gift may increase the number of housing units available to help women get back on their feet, it could also place an undue burden on the agency. Indeed, she learned that they had a need for an additional case manager, so on the spot, she agreed to make another gift from her donor-advised fund for this purpose. In addition, her decorator heard her story and wanted to help too, and she has offered pro bono services to improve the interior of the apartments and the YWCA’s main building.

One of the ways to build a strong and vibrant community is to ensure that area residents are healthy and able to access affordable health care. An issue of concern to one particular donor is the prevalence of heart disease, the leading cause of death in the United States. The outlook is especially grim with the rising rate of childhood obesity, which has more than tripled over the past 30 years. Determined to keep more Richmonders from becoming a statistic, this donor sought the advice of the Foundation staff to develop a targeted giving strategy.

Through multi-year commitments to three agencies – Fan Free Clinic, Capital Area Health Network and Boys & Girls Clubs – he makes it possible for low-income children and adults to make healthy lifestyle changes. With encouragement from medical professionals, mentors and their peers, these at-risk individuals are making responsible food choices, developing exercise plans and managing chronic conditions such as diabetes and hypertension. The increased awareness of the risk factors, better prepare someone to take a proactive role in reducing their chances of developing heart disease. This is a great example of how a DAF advisor can use a community foundation’s staff to maximize the impact of their giving.
A top executive at a legal publishing firm, Joe Briggs created a $1.5 million donor-advised fund with the Rochester Area Community Foundation (NY) in 1989, when the firm was sold and his share was liquidated. All three of the Briggs’s children also created DAFs at the same time, two with the Rochester foundation and one with the New York Community Trust.

Everyone in the family has been an active philanthropist ever since, using their funds to support many different charitable organizations. Joe and Nancy have focused their giving where they live in greater Rochester, Ontario County (NY), and Vero Beach (FL). Joe was elected to the board of the Rochester Area Community Foundation and rose to become its chair in the early 1990s. Not long after, he connected the Community Foundation to a nascent summer enrichment program called Horizons, based on a similarly named program in Connecticut that had had outstanding success in lifting academic results for disadvantaged children. The program was located on the campus of a private school called Harley and became its community outreach arm.

Joe and Nancy, the Community Foundation, and many of our donors supported Horizons as it grew to serve more than 1,000 inner-city Rochester children today, 21 years later. Nearly 100 percent of its graduates finish high school and virtually all go on to college. Moreover, the program has now been replicated at multiple college campuses in greater Rochester. Leveraged by private philanthropy, the Rochester City School District pays $500 per student toward the $2,000 cost because the program is so successful in lifting academic outcomes. Joe and Nancy have become exemplars for other donors in the Community Foundation and Rochester. At Harley, they recently supported creation of a center for civic engagement that carries their family name. The regular Harley students now participate in many additional community outreach programs including a remarkable hospice program that engages them with dying patients.

Throughout this time, the Briggs’s have found their donor-advised fund to be an efficient, inexpensive, effective tool for channeling their charitable giving; identifying other donors with similar interests; learning about new charitable programs from the Community Foundation; and building a base for future giving. Joe and Nancy now have multiple funds with the Community Foundation and a significant plan for giving through their estate. They formed funds for their children to carry on the same kind of philanthropy, while after their deaths the original Briggs donor-advised endowment fund will become a general-purpose endowment providing grants to our community in perpetuity.

Joe and Nancy, the Community Foundation, and many of our donors supported Horizons as it grew to serve more than 1,000 inner-city Rochester children today, 21 years later. Nearly 100 percent of its graduates finish high school and virtually all go on to college.
Los Angeles Dodger Adrian Gonzalez and his wife Betsy opened a donor advised fund at The San Diego Foundation in 2008 to facilitate their charitable giving to the San Diego County and Baja, Mexico regions, where they both grew up. Their fund’s charitable purpose is to support organizations that empower underprivileged youth in areas of athletics, education, and health. For example, the couple has created a scholarship fund through the DAF that expanded their involvement and support for students’ academic success. Since then, Adrian and Betsy have been closely involved in the scholarship application and interview process, to encourage youth to pursue their academic dreams and envision a better future. The Gonzalez’ also host an annual volunteer activity for the scholarship recipients to encourage civic engagement; this year, the activity was a home build with Habitat for Humanity.

The Gonzalez family has also contributed funding to research that illuminated disparities in the region related to green space. Access to green space directly correlates with lower rates of obesity in adults and children, and neighborhood parks also contribute to community building by providing a gathering place. The research report they helped fund, Parks for Everyone, has been leveraged to attract funders, nonprofit organizations, policymakers, and other key stakeholders to support initiatives that promote and expand access to parks and green space for all underserved San Diegans, especially youth.

Adrian and Betsey’s leadership is an inspiration for all San Diego County residents to give back and become involved.

Paul Eichen’s donor advised fund at The San Diego Foundation supports outdoor and recreational initiatives, as well as STEM education for kids. Paul believes that quality of life is strongly dependent on where we live, how safe and secure we feel, how well we know our neighbors, and whether there is a vibrant sense of community. His fund contributes to a series of projects called Gathering Places, where local organizations engage artists, community planners, students, and neighborhood volunteers to convert abandoned urban spaces into beautiful public places for people to build a sense of community. Successful Gathering Place projects in the San Diego region include Butterfly Park in National City and the Manzanita Gathering Place in the City Heights area of San Diego. Both were transformed in a matter of days by hundreds of volunteers and community leaders, with support from Paul. This early work has started a movement that has produced additional grants by Paul and other donors that are transforming blighted land into 30 new community art projects in the San Diego region. These projects are inspiring community conversations at the The San Diego Foundation’s Center for Civic Engagement. Paul believes that an arts-based method of collaborative community building is the best model for creating networks of community builders.

The Gonzalez family has also contributed funding to research that illuminated disparities in the region related to green space.
One anonymous donor at The Seattle Foundation has relied on the Foundation’s community knowledge for more than a decade. The donor – who supports organizations serving health, wellness, and basic needs – came to the Foundation to ensure his giving was going to the most effective organizations. He worked closely with the Foundation’s grantmaking team to hone in on the most timely needs and uncover nonprofit organizations, large and small, that effectively address those needs.

For years, the grantmaking team recommended a slate of nonprofits to the donor, who then chose which ones would get funding. This partnership has now evolved so that each year, the donor gives The Seattle Foundation $400,000 and allows the grantmaking staff to direct it where it is most needed. One beneficiary is Navos, a community health clinic. With generous support from the Foundation and its fundholders, Navos recently completed a new mental health and wellness center in South King County, home to some of the most diverse and economically challenged communities in our region. The new center allows Navos to increase services to often marginalized clients: at-risk and very low-income children. In acknowledging our invaluable role as advisors to fundholders, this donor says, “The Seattle Foundation serves as a filtering mechanism for the many possibilities for giving. As a result of their in-depth, first-hand knowledge of community organizations, I trust their judgment.”

Doug and Nancy Boyden opened a donor-advised fund at the Seattle Foundation to identify nonprofit organizations that have strategic social missions and measurable results in improving people’s lives. Through their fund they support the KidsQuest Children’s Museum, an interactive learning museum that encourages learning through play with an emphasis on science, technology, engineering, art and math (STEAM). The fund also supports Global Partnerships, a Seattle nonprofit that expands opportunity for people living in poverty in Latin America.

Through their fund, Doug and Nancy Boyden support the KidsQuest Children’s Museum, an interactive learning museum that encourages learning through play with an emphasis on science, technology, engineering, art and math (STEAM).
Silicon Valley Community Foundation

In the 1990s, real estate developer Tom Ford delighted in visiting his tenants on Sand Hill Road in person, sometimes with his toddler son, Tommy, in tow. Each time he collected rent, he reminded his tenants that a quarter of their rent was going right back into the community; Ford donated 25 percent of every rent check to the Peninsula Community Foundation. He also established the Sand Hill Foundation in 1995 with wife Susan Ford to benefit environmental and social organizations in San Mateo and Santa Clara counties. Susan Ford Dorsey, the foundation’s president, has continued the foundation’s work since his death in 1998, directing philanthropy, doing site visits and expanding the focus to include education and health care. She has lent her expertise to nonprofit boards and seen firsthand how much difference a little community collaboration can make for groups with shared missions.

Susan sat down with Silicon Valley Community Foundation (SVCF) to discuss maintaining her late husband’s legacy. As a result of this conversation, the Silicon Valley Out-of-School-Time Collaborative was built. The collaborative aims to amplify the impact of a cohort of organizations that focus on academic achievement and college readiness beyond school hours for students from low-income families in Silicon Valley. The collaborative involves nine organizations in the greater Bay Area, from San José to San Mateo County. The executive directors come together on a quarterly basis and talk about things they have in common and their own particular challenges. These regular meetings help the leaders better understand what strategies work, what doesn’t work, and how to ensure more kids can get to college.

John Dawson and Jennie Savage have longstanding commitments of their own to philanthropy. And for the past several years, they’ve combined their charitable energies to bring the transformational power of debate to students in some predominantly low-income Silicon Valley high schools.

Years ago, as John realized financial success from a technology career, he created donor advised funds at both Community Foundation Silicon Valley and Peninsula Community Foundation, SVCF’s parent foundations. He wanted to connect with both organizations and get to know others who were dedicated to charitable giving, including to environmental and international causes. Jennie began giving 10 percent of her income to local nonprofits when she was just out of college and working as a legislative assistant in Washington, D.C. She comes from a family of social activists, so helping her community is a central part of her life.

Now, John and Jennie are helping Silicon Valley youth who often lack a forum for their opinions. The couple are founding board members of the Silicon Valley Urban Debate League (SVUDL), which has launched debate programs at Eastside College Preparatory School in East Palo Alto and Overfelt High School in San Jose – with more to come. SVUDL is part of a nationwide network helping disadvantaged kids succeed academically and personally by mastering debate skills, including public speaking, critical thinking, and

The collaborative aims to amplify the impact of a cohort of organizations that focus on academic achievement and college readiness beyond school hours for students from low-income families in Silicon Valley.

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teamwork. “To have a more reflective democracy, you have to start when the kids are young, and tell them ‘We need all of what you have to say to be brought to the table,’” says Jennie, who credits high school debate with influencing her own professional life in government and education. For both John and Jennie, much of the satisfaction in charitable giving derives from having the personal sense of accomplishment that their involvement in SVUDL and SVCF brings.

**John A. Sobrato knew that almost a quarter of Silicon Valley’s school population was made up of Latino students who were learning English.** Research also showed that these students were eight times more likely than their peers to drop out of high school – many because they did not fully master academic English in their early years. Sobrato knew that tackling the challenges faced by English learners could make a big difference to the Silicon Valley community. In 2008, Sobrato – who has both a donor-advised fund and a family foundation that is a supporting organization to SVCF – made a $6 million initial investment in what has become known as SEAL, or Sobrato Early Academic Language Model. In this model, teachers get the professional development and resources they need to make English academic vocabulary come to life for their students. A SEAL model classroom is alive with language all the time, because to learn academic English, students must be speaking it. Results show that the program is working, and as a result is has grown significantly: From a three-school pilot program in 2009, the Sobrato initiative has grown to serve 36 schools in Santa Clara, San Mateo, Alameda, Marin, and Los Angeles counties during the 2014-15 school year.

**Donor Circles at SVCF provide people with a shared philanthropic goal an opportunity to pool their time, energy and financial resources.** Participants recognize that by giving as a group, they give themselves the chance to make a bigger difference through increased focus and increased funding. At the SVCF, the Donor Circle for the Arts started in late 2008 with the help of Bay Area actress Monica Cappuccini. The Donor Circle for the Arts gives grants up to $5,000 to small local arts organizations with budgets under $1 million that assist underserved and diverse communities. In 2012, the group provided $91,000 to 19 organizations. SVCF also coordinates other Donor Circles that allow the Foundation to bring many donors together to fund worthwhile projects – some local, some international. While this is not a case study of a single donor, it shows that donors to community foundations often use the opportunities provided by the foundation to leverage smaller individual donations and modest donor-advised fund gifts into larger gifts that can have significant local impact.

In the Sobrato Early Academic Language (SEAL) model, teachers get the professional development and resources they need to make English academic vocabulary come to life for their students. A SEAL model classroom is alive with language all the time, because to learn academic English, students must be speaking it.
After a family member won the lottery, a local family established a donor-advised fund at the Community Foundation for Southeast Michigan as part of their plan to give back to the community. The Foundation assisted the family in establishing a philanthropic mission statement, which in part supports charitable organizations that improve the quality of life for children and families, particularly those that are low-income. The Foundation worked in partnership with the family to put together a proposal for a donor-advised fund grant to support the opening of a new dental health clinic serving un-insured and under-insured patients. The relationship with the family has expanded so that the family does all of their charitable giving with the assistance of program staff at the Foundation. Grants from the donor-advised fund have supported a wide range of organizations and has funded workshops to strengthen the capacity of nonprofits.

One donor requested information on charities assisting Detroit youth. Knowing his interest in the arts, the Community Foundation for Southeast Michigan connected the donor with Mosaic Youth Theatre of Detroit, a multi-cultural organization that empowers young people to maximize their potential through professional performing arts training and the creating of theatrical and musical art that engages, transforms, and inspires. As a result of that introduction, the donor has recommended grants to support the organization since 2003, which now total more support to the organization than from any other source.
Greater St. Louis Community Foundation

Creating positive change in the community usually starts with a challenging situation. Sally Barker’s journey was among the most difficult; it began when she lost her son, Alex, to suicide as he struggled to cope with depression. When Alex’s life ended, Barker decided to turn this talented young man’s story into a starting point. She worked with the Greater St. Louis Community Foundation to create a social networking site called “Feeling Kinda Blue” that would provide a safe, supportive place for others who were battling personal challenges in their lives. Instead, Barker set up a donor-advised fund at the Foundation and has used it to distribute grants to several charitable organizations as well as create the website. Barker has been most impressed with the Foundation’s goal of supporting the region and the people in it.

Phyllis Tirmenstein and her good friend Roland Quest enjoyed spending time together doing the things they loved: listening to great music, discussing interesting topics, and going to Cardinals games and boat shows. Roland, who was an engineer and inventor remembered for his significant contributions to the design of the Space Shuttle, passed away in 1994 and entrusted Phyllis to use his savings to do good in the community. Phyllis worked with her attorneys and the Foundation to establish the Roland Quest Memorial Fund in 1995. Through this fund, she issued her first challenge grant for the renovation of Graham Chapel at Washington University, where Roland graduated in 1937. Since then, she has quietly supported a variety of organizations such as the Bach Society, St. Andrew’s Resources for Seniors, the Shepherd’s Center, the Gateway Festival Orchestra and Saint Louis University, where she and Roland worked for many years. The support of the Foundation’s staff has simplified Phyllis’s process for giving and has established a trusted philanthropic partnership. Phyllis was so pleased with the performance of the Roland Quest fund that she decided to establish a charitable gift annuity for her philanthropic legacy. The Phyllis R. Tirmenstein Charitable Fund will provide her an annual income stream and then support the charities important to her when she’s gone.

Sally Barker worked with the Greater St. Louis Community Foundation to create a social networking site called “Feeling Kinda Blue” that would provide a safe, supportive place for others who were battling personal challenges in their lives.
Community Foundation of Tampa Bay

When young entrepreneur and philanthropist Matt Klein lost his battle with drug addiction in 2009, his parents Bill and Ginny Klein decided to continue the work he had started with his private foundation, which he named Kwyjibo after a joke from The Simpsons. The Kleins’ youngest son spent a lot of time researching the causes he supported, so they turned to the Community Foundation of Tampa Bay to help them continue his legacy. Through the Kwyjibo, they continue support of environmental and social causes Matt cared about, and they use the fund to support organizations that help others avoid the kind of addiction that plagued their son.

Barbara Ann Cole remembers her father as a kind and compassionate man who didn’t talk about his experiences as a field hospital physician in World War II, though she knew what he saw there affected him deeply. When she heard that the Franciscan Center in Tampa needed support for a series of retreats aimed at helping first responders deal with the stress of the traumas they see every day, she wanted to help. The focus of her giving through the Community Foundation of Tampa Bay, supports programs that involve people’s relationships with one another individually and collectively. Barbara Ann Cole’s support is making a difference, and hundreds of first responders have been through a five-day retreat since the program began in 2013.

Toledo Community Foundation

To further his father’s philanthropic philosophy in the community, Tom Schmidt of Rossford makes charitable donations to organizations that help people help themselves. When his father established the Edward H. Schmidt Family donor-advised fund at the Toledo Community Foundation in 1994, Tom was helping his dad with his estate plans.

Tom has advised the fund since his father’s death in 2005 and continues to help transform the community by following his dad’s past giving practices, thereby furthering his dad’s name in the community. “Stewardship is done quietly. It’s not done to tell everyone but to help people. Dad’s giving pattern was to support organizations that help businesses and provide education,” says Tom.
The Grantmaking Partners program at the Winston-Salem Foundation enables individuals and families with donor-advised funds to partner with the Foundation to fund grant requests from eligible nonprofit organizations while leveraging more dollars in the community for a wide array of valuable programs. Walt Murray and his wife Martha Ann are frequent Grantmaking Partners, and are thankful for this unique opportunity to learn more about the needs in their city. In addition to encouraging action among donor advisors, the Grantmaking Partners program also helps add to the unrestricted grantmaking resources that allow the Foundation to respond to changing community needs.

Grantmaking Partners offers the best of both scenarios: It gives donors more choices in how their funds may be directed, and it gives the Foundation the potential to fund more unique projects. Through Grantmaking Partners, the Murrays have supported a Little Theatre study to evaluate its branding and recognition in the community as well as Y SAIL, a YMCA project in which volunteers and underprivileged youth build and sail sailboats. When they choose to partner with the Foundation to support a project, some projects naturally fit their interests. Through Grantmaking Partners the Murrays have learned much about their community and have been able to make a lasting impact.

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Wyoming Community Foundation

The scope of Kim and Mary Kay Loves’ giving is as vast as the Sheridan, WY countryside where they live. The couple has always been aware of needs in the community and has enthusiastically worked to extend a helping hand. In 2002 the Loves established a donor-advised fund with the Wyoming Community Foundation (WYCF) to support worthwhile causes.

Grants from the Love fund have supported local medical facilities, the animal shelter, and the senior center. Their philanthropic generosity has helped provide court appointed advocates for children living under tough circumstances, and has also supported a program that allows kids’ access to mentors while enjoying the outdoors. Perhaps the most visible of the Loves’ impact is the over 75 permanent and on-loan sculptures that enliven Sheridan’s main thoroughfares. These works of art are present, because of the Loves’ funding of the Sheridan Public Arts program.

The Loves’ donor-advised fund is just one piece of the many works of charity the Loves engage in. The couple works hand-in-hand with others in the community to support local organizations and individuals. Sheridan Media, their radio station, runs the Christmas Wish campaign in which community members are asked to suggest individuals they feel could use a little extra help around the holidays. The station acts as Santa to make sure wishes such as help with a car payment or medical bill, or even groceries, come through.

The Loves also work hard to ensure that anyone in need or want of dinner at Christmastime has access to it. All are welcome to the senior center, where the Loves provide free prime rib dinners. Most recently the Loves began hosting “Dining for a Cause” at their restaurant, Frackelton’s. The restaurant reserves one day a month in which all proceeds from are given to an organization or cause in the area. The Wyoming Community Foundation helped Kim and Mary Kay Love not only identify opportunities to help create change in their community, but ways to become deeply involved and see that change first-hand.

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The Community Foundation Public Awareness Initiative is a client of the Philanthropy Practice at Van Scoyoc Associates.

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