

# Erie's Vital Signs

Measuring progress. Inspiring action.



The Erie Community Foundation  
2009 Annual Report



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## Measuring Progress: Inspiring Action

Yogi Berra once said, “if you don’t know where you are going, you might end up someplace else!” Thanks to the help of many dedicated volunteers, The Erie Community Foundation made significant progress charting a better future for all in 2009.



Michael Batchelor, President (left) and B.J. Lechner, Chair of The Erie Community Foundation

Our Community Advisory Panels are inspiring action. They are successfully leveraging our grantmaking and community leadership resources to create projects that increase access to healthcare, early childhood education and workforce training

opportunities. Trustees of the Corry, North East, Union City and Findley Lake community foundations joined with our Erie trustees to bring high quality grantmaking and philanthropic services to our entire county.

We also spent considerable time working with the United Way and the Erie Regional Chamber and

Growth Partnership to plan our Erie *Vital Signs* project. For the next decade, this addition to our website will measure progress by tracking community-wide key indicators. We will inspire additional action by aligning our unrestricted grantmaking program to impact these indicators. We will also be working with our donor advisors and other grantmakers to demonstrate how Erie *Vital Signs* can enhance the effectiveness and impact of their own philanthropy.

In a challenging economy, your community foundation experienced substantial growth in 2009. The market value of our total assets reached \$179 million, 55th of more than 700 community foundations nationwide. We also made 1,262 grants, scholarships and awards totaling \$7.5 million. We had our third best year ever in terms of new gifts with over \$11.8 million received. We thank all our donors and encourage others to consider how The Erie Community Foundation can assist with personal philanthropic and estate plans.

Erie County lags behind Pennsylvania and the nation in many economic, educational and health indicators. This is a great place to live, but it can be better. The Erie Community Foundation is committed to an increased program of evidence-based grantmaking to help reverse some of our socioeconomic trends. But we can’t do it alone. On behalf of our entire board and staff, we invite you to learn more about our work and to support our efforts.

Create your own fund at The Erie Community Foundation, or give to an existing one. Leave a meaningful legacy by including us in your estate plan. Volunteer, give, or share your best ideas. Join us in our efforts to both measure progress and inspire action through your Erie Community Foundation.

Sincerely,

A handwritten signature in black ink, appearing to be "B.J. Lechner".

B.J. Lechner, Chair

A handwritten signature in black ink, appearing to be "Michael L. Batchelor".

Michael L. Batchelor, President



## Measuring Progress: *Erie Vital Signs*

In 2001, The Erie Community Foundation made the strategic decision to become a more proactive grantmaker. This change has produced some significant results.

We created a nationally recognized nonprofit capacity building program, The Nonprofit Partnership. Working with many partners, we re-opened a dental clinic at The Martin Luther King Center and established a new site for Community HealthNet. We heightened awareness about poverty in our county. We are a central figure in efforts to establish a community college in our region. Our Community Advisory Panels are increasing access to workforce training, healthcare and quality early childhood education. We put millions of dollars into the accounts of the working poor by creating Erie FREE Taxes, a program to promote the Earned Income Tax Credit. We received a one

million dollar federal grant to help strengthen nonprofits that provide workforce services.

These, and other significant efforts, have brought millions of new federal and private foundation dollars into our community.

But the reality is this: we are kidding ourselves if we think we have made a real dent in Erie's problems. Many community-wide trend lines continue to move in the wrong direction.

At last year's annual meeting, The Erie Community Foundation announced a collaborative effort with the United Way of Erie County and the Erie Regional Chamber and Growth Partnership to develop a manageable number of community-wide key indicators that could be measured and tracked for the next decade.

At this year's annual meeting, we are very proud to launch *Erie Vital Signs*.

The launch of *Erie Vital Signs* provides an important new framework which will focus and leverage our work in new and exciting ways.

Through the *Erie Vital Signs* addition to our website, [www.ErieCommunityFoundation.org](http://www.ErieCommunityFoundation.org), we will be measuring community progress in eight key areas: Brain Gain, Community and Civic Engagement, Cultural Vitality, Environment, Health, the Economy, Pre K–12 Education, and Regionalism for the next decade.

But *Erie Vital Signs* will be a failure if all we do is measure progress. Over time, we will inspire action by gradually aligning our grantmaking to projects that address identified indicators. We will leverage local grantmaking by working with larger private foundations to bring their resources to our community. As we identify promising projects, we will also work to promote their adoption throughout our region.

Erie people know how to help one another. It's in our DNA. We have a culture of philanthropy and volunteerism that is admired throughout the nation.

But our serious demographic trends demand that we focus resources on projects that work. *Erie Vital Signs* will encourage evidenced-based efforts with a proven ability to positively impact trends identified. While some projects will be encouraged by The Erie Community Foundation, *Erie Vital Signs*

is not a community foundation initiative. It is a community initiative. It will take all of us, working together, to ensure our community remains strong for generations to come.

To see the entire *Erie Vital Signs* site visit [www.ErieCommunityFoundation.org](http://www.ErieCommunityFoundation.org).

A project of  
The Erie Community Foundation

SEARCH

Home / News / Get Involved / Contact

Brain Gain | Community & Civic Engagement | Cultural Vitality | Environment | Health | The Economy | Pre K-12 Education | Regionalism

### Who we are:

A collaboration of [The Erie Community Foundation](#), [The Nonprofit Partnership](#), [United Way of Erie County](#) and [Erie Regional Chamber & Growth Partnership](#) to identify a number of community-wide key indicators.

### What we do:

Erie Vital Signs will monitor community progress in eight major topical areas for the next decade. This key indicator project will help us maintain focus on key community issues. Objective data will clearly demonstrate areas of community pride and areas where we are falling short. The [Key Indicators](#) are Brain Gain, Community & Civic Engagement, Cultural Vitality, Environment, Health, The Economy, Pre K-12 Education and Regionalism. The "Resources" portions of this website will identify promising pilot projects and best practices needed to enhance Erie County.

### Key Indicator Legend:

- Following an upward trend.
- Following a downward trend.
- No significant trend movement.

### Get involved:

We'd like to hear from you. If you have any ideas or concerns to help keep Erie County moving forward [click here](#).

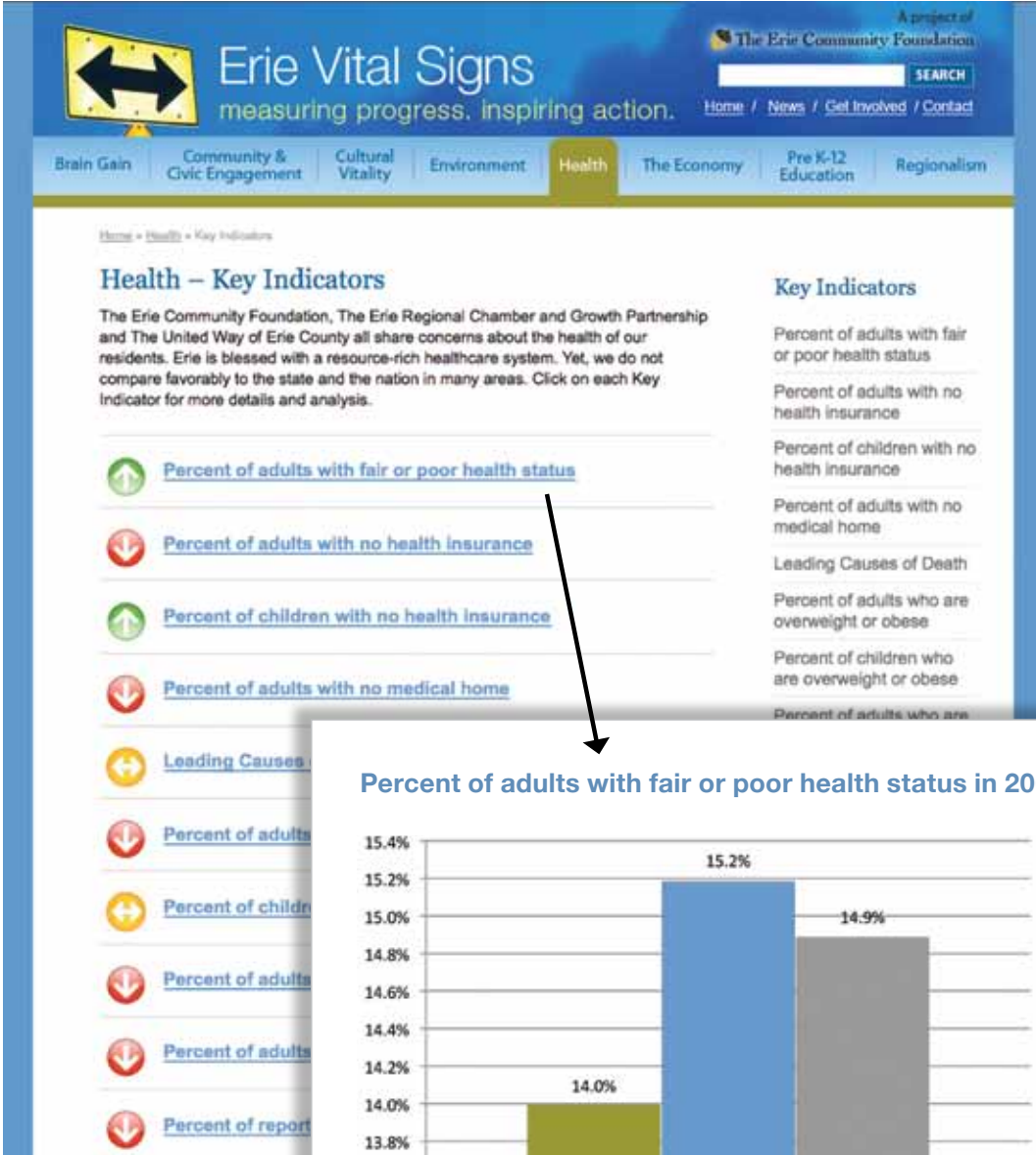
### Latest News •

July 21 • [Full Story >](#)  
**Erie Community Foundation Annual Meeting**  
The Ambassador Banquet and Conference Center — August 12, 2010

July 20 • [Full Story >](#)  
**Early Education Community Report Now Available**  
A snapshot of Erie County statistics that impact early care and education, identifies the current provider network, developmental factors of our children, the economic and societal impacts, and current efforts in the area.

July 16 • [Full Story >](#)  
**Why do we need a Community College?**  
For several decades, Erie County has become poorer, less educated and older on average than the rest of the United States. Since 2000, things have spiraled downward...

[Click for more news](#)



## Erie Vital Signs Example: Health

Many say that if you haven't got your health, then you haven't got anything. Anyone living with a chronic condition or caring for an ailing relative knows the toll it takes on your quality of life. Access to timely and appropriate physical and mental healthcare empowers personal responsibility. Our citizens need to make good decisions about preventative measures and to seek appropriate and timely treatment when needed. In

many ways, Erie is resource-rich when it comes to healthcare programs and services available. Yet, disparities driven by race, income, and other barriers to access remain. Our community needs to level the playing field to ensure optimum and economic healthcare for all its citizens.

### Key Indicators

- Percent of adults with fair or poor health status
- Percent of adults with no health insurance
- Percent of children with no health insurance
- Percent of adults with no medical home
- Leading causes of death
- Percent of adults who are overweight or obese
- Percent of children who are overweight or obese
- Percent of children who are overweight or obese
- Percent of adults who are current smokers
- Percent of adults who are binge drinkers
- Percent of reported and substantiated child abuse
- Infant mortality
- Low birth weight
- Percent of mothers receiving prenatal care
- Percent of births to mothers under 18

## Erie Vital Signs Example: Pre K-12 Education

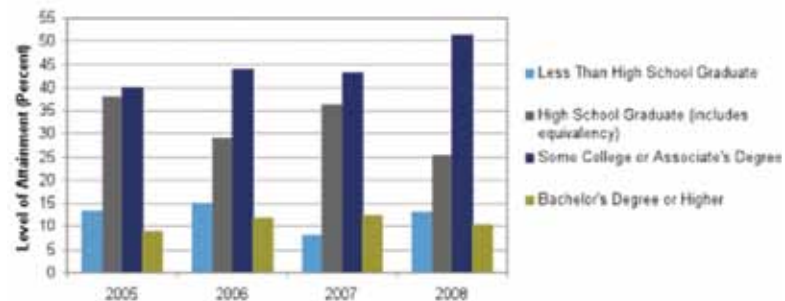
Consultants tell us third grade reading levels correlate closely with the number of prison beds a community needs in future years. Access to quality education is the great equalizer. Successful communities foster a lifelong love of learning—in schools, in homes and in the workplace. Research shows a strong educational foundation leads to better employment opportunities, a more competitive workforce, and ultimately the community's ability to remain competitive in today's global economy. Higher educational attainment is a direct corollary to higher income, better health, and a host of other factors that make individuals and communities more productive.

### Key Indicators

- Educational attainment
- PSSA results
- SAT scores
- Early childhood education—programs participation
- Early childhood education—risk factor comparison
- Early childhood education risk factors—birth-related
- Early childhood education risk factors—education-related
- Early childhood education risk factors—family-related

The screenshot shows the 'Erie Vital Signs' website interface. At the top, there is a navigation bar with categories like 'Brain Gain', 'Community & Civic Engagement', 'Cultural Vitality', 'Environment', 'Health', 'The Economy', 'Pre K-12 Education', and 'Regionalism'. The 'Pre K-12 Education' section is highlighted. Below this, the page title is 'Pre K-12 Education – Key Indicators' with a sub-header 'Click on each Key Indicator for more details and analysis.' A list of indicators is shown, each with a directional icon (up, down, or double-headed arrow) and a link. A black arrow points from the 'Educational Attainment' link to a bar chart below.

**Erie County 18-24 Year Olds - Educational Attainment**





# Measuring Progress: Financials



The Erie Community Foundation takes its fiduciary responsibilities quite seriously. Our primary job is to maintain the charitable purchasing power of endowed funds over time. The very first dollar gifted to our predecessor organization, The Erie Endowment, in 1935 is still hard at work producing income that is used to make grants to terrific community projects in 2010.

The finance committee of The Erie Community Foundation—Bob Dwyer, Ted Junker, B.J. Lechner, Phil Tredway and Doug Ziegler—meets every two months to review endowment performance. We retain an independent investment consulting firm to assist with policy development, manager selection and performance evaluation.

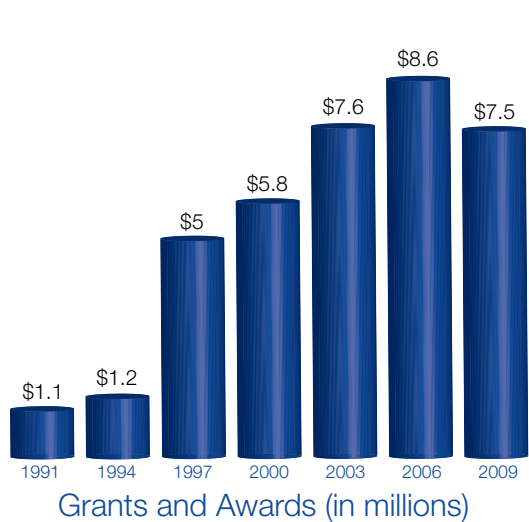
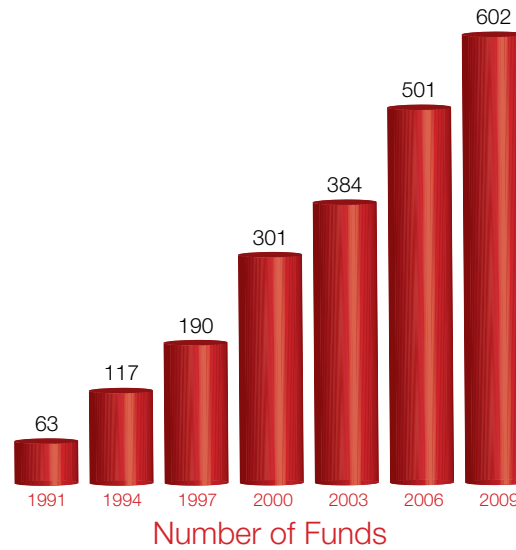
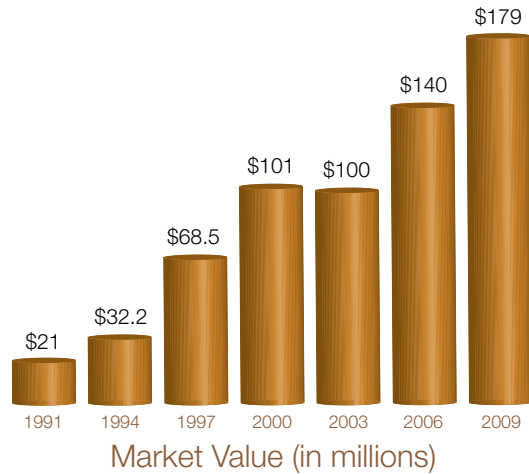
Whenever possible, funds are pooled to assist with investment management economies of scale and to access investment products not readily available to the smaller investor. Approximately one dozen investment managers are utilized over multiple investment pools.

Individual manager performance is tracked against appropriate benchmarks. When performance lags, changes are made. The entire portfolio is also tracked against institutional and community foundation peers. To maintain charitable purchasing power over time, some level of risk is needed. Community foundation investment performance will fluctuate with markets.

The net total return of The Erie Community Foundation assets for calendar year 2009 was 22.4 percent.

\*Audited financial statements and IRS 990 forms are available upon request at our office or by calling (814) 454-0843.

# Measuring Progress: Years in Review



## Statement of Financial Position as of December 31, 2009\*

### Assets

Cash and Investments _____	\$ 140,677,056
Gifts, Trusts, and Estates Receivable _____	36,481,074
Cash Value of Life Insurance Policies _____	267,785
Office Furniture, Equipment, and Other Assets ____	1,506,161
<b>Total _____</b>	<b>\$ 178,932,076</b>

Increase in Net Assets _____	\$ 24,928,683
Beginning Net Assets _____	\$ 122,769,975
Ending Net Assets _____	\$ 147,698,658

### Liabilities

Grants and Accounts Payable _____	\$ 27,319,399
Loan Payable _____	880,334
Payables to Annuitants _____	3,033,685
<b>Total _____</b>	<b>\$ 31,233,418</b>

## Statement of Revenue, Expenses and Grants Paid for the Year Ending December 31, 2009

### Revenue

Public Support – Gifts and Bequests _____	\$ 11,831,413
Net Investment Losses and Income _____	22,512,285
Other Income _____	443,941
Decrease in Value of Split Interest Agreements ____	(301,863)
<b>Total _____</b>	<b>\$ 34,485,776</b>

### Expenditures

Grants and Awards _____	\$ 7,451,336
Fund Raising, Administrative and Program _____	1,612,997
Fees to Investment Managers _____	349,622
Depreciation _____	106,938
<b>Total _____</b>	<b>\$ 9,520,893</b>



## Inspiring Action: A Donor Story

Our donors are inspiring. They identify their favorite charities and give to them *through* The Erie Community Foundation. Together, we multiply the magnitude of donor generosity. It's leverage. We empower our donors with the greater responsibility to lift up others.

Our goal is to be a resource. The Erie Community Foundation is an effective tool to help donors accomplish their personal philanthropic and estate planning objectives in a cost-effective fashion. At The Erie Community Foundation, we understand our community's needs, and we know the nonprofits and the leaders who can meet those needs.

Then we connect donors to those needs. Donors like Chuck Rapp. Chuck Rapp knows paper. He knows the process to make paper from trees while protecting the environment. Chuck spent 24 years as a researcher at Hammermill Paper Company, perfecting his craft as a project manager. Yet, the most

important piece of paper he worked on in his lifetime was the one he signed when he recently made The Erie Community Foundation the lead beneficiary of his estate.

"I have had a great life, and I enjoy being retired. In recent years, I became more concerned about my estate plans and what I could do to help others," said Rapp. "When my financial advisor told me how easy it would be to support my favorite charities forever, I called Kevin Moore and began planning."

Like many without children, Chuck began to think about the future and how his hard work and life savings could benefit others in his community. Using The Foundation to manage his estate gift, Chuck chose to perpetually support three of his favorite charities: The Boy Scouts of America, Asbury Woods Partnership, and the French Creek Council Conservancy. "Over the years, I gave of my time as Scout Master, volunteer, and donor," Rapp said. "I became very passionate about each of their missions, and I want these nonprofits to remain



Donor Chuck Rapp at Asbury Woods Nature Center

successful for many years to come. I am delighted that my fund will help make that possible.”

“By creating a named fund at The Erie Community Foundation, donors can provide perpetual funding for their favorite causes and organizations,” said Kevin Moore, vice president of stewardship.

“Through effective estate planning, your hard earned dollars grow to benefit our community instead of going to Harrisburg or Washington, D.C.” If you are interested in learning more about making a permanent difference for the causes you care about most, call Kevin at (814) 454-0843 for a no obligation discussion. Maybe someday you will have a donor story to share.

## Inspiring Action: Eight Great Ways You Can Be Inspired



To ensure that a permanent source of philanthropic support remains in our community for generations to come, your Erie Community Foundation permanently endows a vast majority of named funds. You have many choices to make a difference.

**Unrestricted Funds** are the perfect funds for you if you have broad charitable interests and a vision for the future. If you choose this fund, you offer The Erie Community Foundation maximum flexibility to respond to the changing needs in the community forever.

**Donor Designated Funds** are created to perpetually benefit one or more specific charities of your choice. Grants will be made in the name of your fund so long as the organization remains in operation and is consistent with its original charitable purpose.

**Donor Advised Funds** are an attractive alternative to the creation of a private foundation because your donor-advised fund receives a 100 percent tax deduction for the original gift and any other gifts. In future years, you may suggest deserving charities to benefit from fund income or, if desired, principal. Grants are then made, in the name of your fund, to your favored charities.

**Geographic Funds** are designed for your charitable interests and are limited to a particular geographic area within Erie County.

**Scholarship Funds** support students who attend a particular school or study a specific subject. Each scholarship is unique. You can design your scholarship fund in memory of, or in honor of, a loved one with specific parameters.

**Field of Interest Funds** are ideal if you want to support a particular broad charitable cause, such as the arts, education, health, environment, human services or community development.

**Pass-Through Funds** allow a gift to The Erie Community Foundation to “pass through” to your favored charity. This may be appropriate when you want anonymity or when a unique property is used to make a gift.

**Annuities and Trusts** can be important estate planning tools. We have significant experience with charitable remainder, lead and annuity trusts. These planned giving alternatives often create beneficial situations for both you and your favorite nonprofits.

“No one has ever become poor by giving.”  
—Anne Frank



## Inspiring Action: Join The Elisha H. Mack Society

In 1935, Elisha H. Mack created a fund that continues to benefit Erie today. Inspired by this legacy, The Erie Community Foundation established the Elisha H. Mack Community Bequest Society to recognize donors who remember the Erie community in their estate planning process. Nearly 100 civic-minded donors have joined.

In 2009, The Foundation inspired and encouraged local nonprofits to partner with us to promote the Mack Society. This partnership lets nonprofits focus on their mission, while The Erie Community Foundation concentrates on growing endowments that will benefit their organizations in perpetuity.

To date, the Erie Zoo, Erie Playhouse, SafeNet, the Humane Society of Northwestern Pennsylvania and Asbury Woods Nature Center have become partners in this project.

The Elisha H. Mack Society offers you the opportunity to recognize your favorite nonprofit in your estate planning today to ensure a brighter and stronger future for the Erie community forever. We hope you are inspired to give a gift that costs you nothing today, with benefits that last forever.



Pictured left to right are: Joe Grisanti, executive director of the Humane Society of Northwestern Pennsylvania; Linda Lyons King, executive director of SafeNet; Scott Mitchell, president and CEO of the Erie Zoo; Almitra Clerkin, executive director of the Erie Playhouse; Shirley Williams, board president of SafeNet.

## Include The Foundation in Your Will

"I give, devise and bequeath the following:

\_\_\_\_\_ Fund  
(describe assets that are subject of the bequest; for example, a stated sum or the residue of the estate or a percentage of the residue of the estate) to The Erie Community Foundation, a Pennsylvania nonprofit corporation.

This gift shall be known as the \_\_\_\_\_ Fund  
(the name you choose)."

If it is desired that the bequest be applied to an area of charitable interest or to specific organizations, add "this Fund shall be devoted to the support of:"

Many significant gifts may also be made during a donor's lifetime. Your professional advisors or The Foundation staff can provide additional information. Call Kevin Moore, vice president, stewardship and regional affiliates.

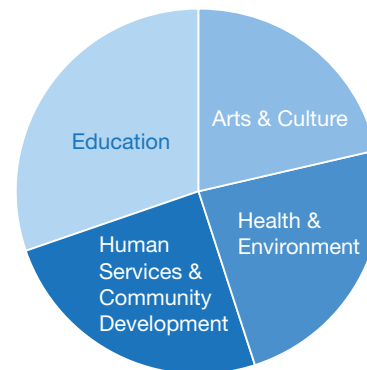
## Inspiring Action: Helping Today Grants

Every year, every quarter, we are inspired by the good work done by our local nonprofit community. Often times, their work goes unnoticed with little public fanfare but with great public impact. We are proud to support our nonprofit community through *Helping today* grantmaking work.

To help our nonprofits remain focused on their mission, The Foundation meets their immediate needs through our *Helping today* grantmaking. When a nonprofit is not worried about replacing a new roof, updating a furnace or installing a wheelchair ramp, they can more wisely spend their time and dollars making wishes come true for kids with cancer, providing shelter for the homeless or educating the underprivileged.

Thanks to the support of inspired donors, it is all possible through The Erie Community Foundation's competitive grantmaking program. If you serve on a nonprofit

board or work for a nonprofit, remember to consider The Erie Community Foundation for your specific projects or programs. The Foundation funds a wide range of nonprofit organizations serving Erie County through its competitive grant process. Each quarter, our diligent Grant Review Panel evaluates and approves *Helping today* grants. The panel is comprised of Erie Community Foundation Trustees and other



Grants Per Cycle

Arts & Culture	\$243,750	20 grants
Health & Environment	\$324,972	22 grants
Human Services & Community Development	\$270,836	23 grants
Education	\$315,633	28 grants

"There is no power for change greater than a community discovering what it cares about."

—Margaret J. Wheatley

community leaders who are sensitive to changing needs and who represent various segments of our community.

For *Helping today* grantmaking, grants are divided into program areas. Going forward, these program areas will reflect the work of *Erie Vital Signs*.

Grant deadlines, application materials and technical assistance workshop details are available at our website [www.ErieCommunityFoundation.org](http://www.ErieCommunityFoundation.org) or by calling David González, program officer, at (814) 454-0843.



## Inspiring Action: Shaping Tomorrow Grants

*Shaping tomorrow* grants bring transformational ideas to our community. These grants support multi-year collaborations focused on our community's most pressing issues. This work creates partnerships. It builds a common understanding. It leverages new resources. It is tough. It takes time, but it is producing tangible results.

**Community Advisory Panels (CAPs)** In 2009, your Erie Community Foundation implemented Community Advisory Panels to maximize and leverage our grantmaking in areas identified as the primary antecedents of poverty. By increasing access to healthcare, workforce training opportunities and early childhood education, we are moving the needle and making a measurable difference in addressing the unacceptable rates of poverty that exist in our community.

Each Community Advisory Panel is inspired to study and recommend specific solutions. To assist with



Nonprofit Partnership Day



Community Advisory Panel on Health



ReTool Erie



Michael Batchelor, president, The Erie Community Foundation; Bob Wooler, director, The Nonprofit Partnership; and Gary Ravetto, associate director, Nonprofit Partnership, welcome Peter Brinckerhoff of Corporate Alternatives, Inc., as the keynote speaker of Nonprofit Day 2009.

this work, we convene experts in the field to help identify best practices and unique grantmaking opportunities. The Erie Community Foundation allocates up to \$100,000 a year for each area of work. The Community Advisory Panels identify ways to use this funding to leverage additional new private foundation or governmental resources.

**The Nonprofit Partnership** provides high-quality programs and technical assistance services to strengthen

our nonprofit sector. NWPAs Nonprofit Day features keynote speakers as well as multiple workshops for nonprofits to improve their operations.

**Erie FREE Taxes** facilitates the economic independence of low-income individuals and families through free tax preparation services and by providing financial literacy and education. Erie FREE Taxes returned over \$4.5 million to Erie County through tax refunds for 2009. More than 2,500 low to moderate income working families received free tax preparation services through Erie FREE Taxes,



Pictured left to right are Andy Mettlen, taxpayer advocate, IRS; Regis Bodnar, senior tax specialist, IRS; Cheryl Bates, program director of Erie FREE Taxes; and Shiloh Turner, vice president of Programs for The Erie Community Foundation.

and more than 1,000 of these people received the Earned Income Tax Credit.

**ReTool Erie** is a partnership of The Erie Community Foundation, The Nonprofit Partnership, and the Regional Center for Workforce Excellence. Supported by a \$1 million Federal Grant of the American Recovery and Reinvestment Act, ReTool Erie is a new project aimed at strengthening local nonprofits focused on workforce development. Through training, one-on-one technical assistance, and competitive capacity building grants, the goal of ReTool Erie is to help organizations and their clients prepare for and meet the challenges of our changing economy.

“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.”

—Margaret Mead

**Shaping Tomorrow  
Funding Leveraged:  
\$4.5 million**

- Capacity-Building for Nonprofits—\$1,375,000
- Erie FREE Taxes—\$60,000 in external funding/\$4.5 million in tax refunds
- Workforce CAP—\$1,080,500
- Healthcare CAP—\$1,955,800



## Inspiring Action: Our Staff and Volunteers

We can't do it alone. Part of our work is to inspire others so they take action. We thank the scores of community volunteers, all working to improve our region through The Erie Community Foundation.

### Staff

Michael L. Batchelor, *President*  
Jayne M. Randall, *Executive Assistant/Scholarship Coordinator*  
Shiloh Turner, *VP Programs*  
David González, *Program Officer*  
Tiffanie L. Martin, *Program Associate*  
Cheryl Bates, *Erie FREE Taxes*  
\*Amanda Brown Sisseem, *ReTool Erie Project Officer*  
\*Michael Brand, *ReTool Erie Project Officer*  
Kevin E. Moore, *VP Stewardship and Regional Affiliates*  
Erin D. Fessler, *Marketing and Public Relations Director*  
Donna M. Buseck, *Administrative Assistant/Receptionist*  
Jane G. Cowell, *Funds Administrator and Stewardship Associate*  
Barbara F. Sambroak, CPA  
*Chief Financial Officer*  
Amanda Schantz Lincoln,  
*Accountant*

### Erie Community Foundation Trustees

B.J. Lechner, *Chair*  
Michael Batchelor, *President*  
Robert G. Dwyer, Esq., *Secretary*  
Philip Tredway, *Treasurer*  
Clemont R. Austin  
Geoffrey Dunn, M.D., F.A.C.S.  
Susan Kemenyffy  
Marne R. Roche  
Tim Shuttleworth  
R. Anthony Snow, M.D.  
Russell Warner, Esq.  
Maryann C. Yochim

### Grant Review Panel

Michael Batchelor  
Peg Bly  
Dr. Geoffrey Dunn  
David González  
Donna Hixon, Ph.D.  
Gary Horton  
Susan Kemenyffy  
Dale McBrier  
Mark Raimy  
Marne Roche  
Shiloh Turner  
Russell Warner, Esq.

\*Federal grant supported position

### **Corry Community Foundation Trustees**

Rick Peterson  
John (Chip) Colwell  
Mary Alice Hammond  
Phyllis Marchitelli  
Ken Neckers  
Bill Nichols  
Bill Roche  
Marne Roche  
Mamie Smith

### **North East Community Foundation Trustees**

William Lewis  
Donald Damon  
Sonia Fails  
Jim Gorzynski  
Robert Jeffrey  
Ernest Lake (emeritus)  
Christopher Miller  
Judith Miller, Ph.D.  
Nicholas Mobilia  
Reverend David Oyler  
Ken Slaney, CPA, CFP  
Geraldine Smith  
James Walczak, Esq.

### **Union City Community Foundation Trustees**

Steven Jones  
Dr. Rogelio Allanigue  
Abbe Biebel  
Kyle Blakeslee  
C. Angela Bontempo  
Diane Bowes  
Darrel Cooper  
Gerald Eddy  
Thomas Fucci  
Ronald O. Jones  
Steven Jones  
Carl Kallgren, Ph.D.  
Richard Mason  
Larry Obert  
Rebecca Stuart  
Norman Troyer

### **Findley Lake Community Foundation Trustees**

Thomas Roche  
David Bartrum  
Rebecca Brumagin  
Carol Eller  
Jack Graham  
Donna Beth Luce  
Albert Stohr  
Michele Vonk

### **Community Advisory Panels**

#### **Healthcare**

Yvonne Cook  
Dr. Geoffrey Dunn  
Dr. Bruce Gebhardt  
Andy Glass  
Charles “Boo” Hagerty  
Dr. Hank Hill  
Bill McCarthy  
Msgr. David A. Rubino, Ph.D.



#### **Workforce Development**

James Borelli  
John Elliott  
Beverly Fetzner  
B.J. Lechner  
Dale McBrier  
Michele Zieziula



#### **Early Childhood Education**

Tammy Bartosavich, Ph.D.  
Karen Bauer, Ph.D.  
Bill Jackson  
Nancy Kalista  
Susan Kemenyffy  
Marne Roche  
Nick Scott Jr.  
Dennis Valone, Ed.D.  
Robert Wooler  
Maryann Yochim



### **The Erie Women’s Fund**

50 Members

### **The Elisha H. Mack Society Planning Committee**

11 Members

### **Scholarship Committees**

115 Members



## Donor Bill of Rights

- To be informed of The Foundation's mission, of the way The Foundation intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- To be informed of the identity of those serving on The Foundation's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to The Foundation's most recent financial statements.
- To be assured your gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgment and recognition.
- To be assured that information about your donation is handled with respect and with confidentiality to the extent provided by law.
- To expect that all interactions with The Foundation will be professional in nature.
- To be informed whether those seeking donations are volunteers or paid staff.
- To have competent administration that can implement procedures to carry out board policies.
- To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

# Application Guidelines

## I. Helping Today

The competitive grant-making program of The Erie Community Foundation annually funds a large number of nonprofit organizations serving Erie County. Grants are awarded upon review by our staff, our grants panel and our board of trustees.

Going forward, we will increasingly align our grantmaking to address issues identified in *Erie Vital Signs*. We will welcome proposals that address the identified indicators on the following time schedule:

- 1st Quarter—Cultural Vitality & Community and Civic Engagement
- 2nd Quarter—Economy & Regionalism
- 3rd Quarter—Health & Environment
- 4th Quarter—Pre K-12 Education & Brain Gain

Specific deadlines and application materials may be obtained by contacting David González, program officer at (814) 454-0843 or by visiting our website at [www.ErieCommunityFoundation.org](http://www.ErieCommunityFoundation.org).

Proposals affecting Corry, North East and Union City should first contact our regional affiliates. For Corry, please call (814) 664-3884. For North East, call (814) 725-9617 or visit their website at [www.necommunityfoundation.org](http://www.necommunityfoundation.org). For Union City, please call (814) 438-7622. You are also encouraged to contact Kevin Moore, vice president of philanthropic stewardship and regional affiliates at (814) 454-0843.

## II. Shaping Tomorrow

The Erie Community Foundation also awards competitive grants on a Request for Proposal basis. These funds are used to foster new and creative partnerships, create a common understanding of the issues, coordinate our grantmaking

with other initiatives in the community, and leverage our funding to maximize resources. Our agenda is to address the primary antecedents of poverty by increasing access to healthcare, workforce training opportunities, and early childhood education.

Nonprofit organizations interested in working with The Erie Community Foundation on these issues should contact Shiloh Turner, MPA, vice president of programs at (814) 454-0843.

## III. Donor Advised Funds

The Erie Community Foundation also annually awards more than a thousand grants from donor advised, scholarship, agency endowment and donor designated funds. While each of these funds are considered Foundation property, they do operate in accordance with the wishes of the original donors.



“The universal brotherhood of man is our most precious possession.”

—Mark Twain



The Erie  
Community  
Foundation

## Mission Statement

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