

# IMPACT

## 18th Annual Meeting Shows We Are Better Together

### better together

**Better Together** is a collaborative among The Foundation, The Erie Regional Chamber and Growth Partnership, The United Way of Erie County and The Nonprofit Partnership to select and monitor a number of community-wide key indicators over time.

The Foundation will also provide funding to the higher education community to help identify national best practices for local implementation. For each pressing issue, **Better Together** will track key data points, identify current organizations and resources and research best practices for creating long-term sustainable solutions.

**Better Together** will convene a broad constituency around timely issues and produce annual report cards to communicate progress on each key indicator.

Well over 500 guests learned that we are all “*Better Together*” at this year’s annual meeting. As guests entered, the Erie Zoo welcomed them with various zoo animals. To kick off the meeting, the Erie Playhouse Youtheatre children sang and danced for the audience with the song, “*We Are Going to the Zoo Tomorrow.*” Mike Batchelor, president of The Erie Community Foundation, introduced the “*Better Together*” project as a “game changer” for the Erie community.

“Our annual meeting is a celebration of the many community partnerships that provide a better quality of life for all of us,” said Batchelor. “The Foundation truly belongs to the community, and our endowments, now valued at nearly \$200 million, enhance the lives of many of our area’s neediest citizens.”

*(Continued on page 2)*

In lieu of flowers and heavy hors d’oeuvres at The Erie Community Foundation’s 18th annual meeting, The Foundation treated over 600 kids from 10 local nonprofits, such as St. Martin Center, to a day at the Erie Zoo this past August.



Front row: Ryan Reichert, Alaya Rosario, Jakayla Dunlap  
Middle row: Derek Briggs, Elliot Backstrom, Honest Harman, Isis Coleman  
Back row: Dr. David Doupé, Mike Batchelor and Beverly Ann Doupé

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The Foundation honored Susan Hirt Hagen with the Edward C. Doll Community Service Award, which was presented by Edward P. Junker III and Dr. Jack Burke, of Penn State Erie, The Behrend College. As part of the Doll Award, the recipient makes a \$15,000 grant to his or her favored charity. For the first time in the award's history, The Erie Community Foundation was selected by the honoree, Ms. Hagen.

The following day, your Erie Community Foundation treated over 600 kids from 10 local nonprofits to a free day at the Zoo. "This is one more way we can demonstrate that we really are Better Together," Batchelor said.



Jonathan Hagen, of Philadelphia, joins his parents, Tom and Susan Hirt Hagen, at the ceremony during which Susan received the Edward C. Doll Community Service Award.








Erie Playhouse performers included: Back row, L to R: Maggie Cooney, Nathan Nitzczynski, Katie Conti, Alanna Grafius, Ali Dickson, Zach Zalewski and Front row, L to R: Ethan Craig, Grace Smrcka, Frank Smrcka, Josie Noyes, Julia Fessler, Jade Burns, Ashlyn Keenan, Shauna Case

## FOUNDATION LOOKS FORWARD

"Your community foundation has changed," said Mike Batchelor, president of The Erie Community Foundation. "While we continue responding to immediate needs as submitted by local nonprofits, our growth now enables us to work with various partners focused on larger and systemic issues facing the region."

Specific activities include:

-  **The Nonprofit Partnership (NPP)**—to increase the capacity of nonprofit organizations. Last year, the NPP provided over 70 training programs, servicing well over 1,500 staff and board members of their 197 member organizations.
-  **Erie FREE Taxes**—to promote the Earned Income Tax Credit (EITC) and financial literacy. In 2009, more than \$1.3 million EITC refund dollars were returned to Erie County EITC claimants. An additional \$2.5 million dollars in total tax refunds were also awarded. The IRS recognizes this as a high performing program.
-  **Community Advisory Panels (CAPS)**—to enhance access to health care, workforce training opportunities, and quality early childhood education. The Foundation convened experts in the field to identify best practices and unique grantmaking opportunities. CAPS will generate significant private foundation and governmental revenue streams for our region.
-  **Poverty Awareness**—to promote an increased understanding of poverty and reduction strategies.
-  **Better Together**—to collaboratively develop a regional key-indicator project.

# Turning Retirement Accounts into Charitable Good

Donors who have celebrated 70 birthdays or more have something else to celebrate! Through December 31, 2009, a new law allows those age 70½ and above to transfer up to \$100,000 from an IRA to a nonprofit this year—tax-free. If married, each spouse can transfer \$100,000 per year from his or her IRA. This may be an attractive giving option for you if you are:

- Over 70½
- Receiving minimum IRA distributions
- Not in need of extra income
- Interested in making a significant lifetime gift.

“Using IRA assets to make a gift during your life, as opposed to giving via bequest in your will, enables you to experience the joy of making a major gift,” said Kevin Moore, vice president of stewardship. “We are ready to help our donors understand the legislation as well as share information on the latest community needs.” For more information, please contact Moore at (814) 454-0843 or by email at [kmoore@eriecommunityfoundation.org](mailto:kmoore@eriecommunityfoundation.org).

# FOUNDATION AWARDED \$1 MILLION IN FEDERAL GRANT MONEY



The U.S. Department of Health and Human Services just awarded a \$1 million grant, the maximum amount, to The Erie Community Foundation. Over the next two years, the grant will assist Erie County nonprofit organizations in their efforts to put county residents back to work. A total of \$46 million was awarded throughout the nation. Only 26 of the 84 awardees received the maximum \$1 million.

“This is extremely good news, coming on the heels of the high poverty rate in Erie County,” said Mike Batchelor, president of The Foundation. “Through this significant grant, we will work with grass roots nonprofits throughout the county to strengthen their abilities to boost our workforce.” The program entitled, *Strengthening Erie’s Workforce*, combines the efforts of The

Foundation, The Nonprofit Partnership and the Regional Center for Workforce Excellence, Northwest Pennsylvania’s Workforce Investment Board. “This demonstrates that a collaborative approach towards community problem-solving is productive and that our community can access federal stimulus dollars,” Batchelor added.

*Strengthening Erie’s Workforce* will offer workshops that respond to the needs of nonprofits focused on workforce development. The training will be coupled with \$600,000 in direct funding. “Over a 24 month period, we estimate helping 100 different local nonprofits in education and training,” said Shiloh Turner, vice president of programs at The Foundation.



# Foundation Boosts Nonprofit Sector

To meet the mission of The Erie Community Foundation, each quarter the board of trustees reviews grant applications and distributes unrestricted dollars to nonprofits. Recently, The Foundation granted nearly \$290,000 to 23 local nonprofits and neighborhood mini-grants in the amount of \$20,000 to 27 schools as part of “Helping today” grantmaking. Pictured are: **Mike Batchelor**, president of The Foundation, and **Rubye Jenkins-Husband**, representing the United Neighborhood Facilities Health Care Corporation, which received \$3,434 for computers for the Sickle Cell Anemia project.



## 250 Students Receive \$405,000 in Scholarships

Your Erie Community Foundation presented \$405,000 in scholarships to nearly 250 students at the Annual Scholarship Reception hosted by Penn State Behrend. The guest speaker was Hank Graygo, who with his wife Betty, established the Lindsay Graygo Memorial Scholarship in honor of their daughter. Pictured below with the Graygos are **Kristina Caldwell** and **Lindsey Masterson**, the first recipients of the Lindsay Graygo Memorial Scholarship which was established in 2008.

"In today's world, scholarships are increasingly important for students and highly rewarding for donors," said Mike Batchelor, president of The Erie Community Foundation. The Foundation is home to 73 different scholarships, each with distinct criteria established by the donor.



## Calendar of Events

- OCTOBER 20** ..... Pre-Conference on eMarketing
- OCTOBER 21** ..... Nonprofit Partnership Day at the Bayfront Convention Center
- NOVEMBER 12** ..... Donor Orientation(s) for New Website at 7:30 a.m., Noon and 4 p.m. at The Erie Community Foundation
- DECEMBER 5** ..... Elisha H. Mack Bequest Society Event and Donor Education Event at The Erie Playhouse at 6 p.m. with discounted tickets for *White Christmas*

For details, visit [www.eriecommunityfoundation.org](http://www.eriecommunityfoundation.org)

## We Hear You— Donor Survey Results

The results are in! Recently, The Erie Community Foundation worked with Dr. Phyllis Mansfield, professor of Marketing at Penn State Behrend to implement a first ever survey of our donor population. One hundred eighty-seven surveys were mailed to individual donors (agencies were surveyed in 2007) and 47 percent returned completed surveys for data analysis by Penn State students and faculty.

Overall, the surveys found donors were very satisfied with the level of customer service, expertise and communication from The Foundation staff. Donors responded by clearly stating that they have "confidence in The Foundation," and when asked why they give, the top response was to "strengthen my local community." Donors also reported that The Foundation has a record of "sound investment and performance," and nearly 89 percent rated their overall satisfaction as either "good" or "excellent."

"Our donors feel very good about helping others," said Kevin Moore, VP of stewardship, who led the survey effort. "Our donors can be characterized as intensely civic-minded, with a clear belief in our community and The Foundation's ability to help them navigate complicated philanthropic waters."

To read the entire executive summary, visit [www.eriecommunityfoundation.org](http://www.eriecommunityfoundation.org).



The Greater Erie Community Action Committee (GECAC), the Erie Regional Chamber and Growth Partnership and The Erie Community Foundation recently hosted a Poverty Simulation and Discussion.

Pictured from left to right are: Ron Steele of GECAC; Bill Jackson of United Way; Jennifer Bach of Erie Together; Shiloh Turner of The Erie Community Foundation; Nyima Porter of GECAC, Dr. Laura Lewis of Mercyhurst College and Deb Liebel of Erie Together.

## Donor Education at Your Erie Community Foundation



*Donor Dish*

There are several opportunities for current and prospective donors to learn how The Foundation can help assure that charitable dollars are used in the most efficient and effective way possible. As the largest grantor in Erie County, we operate at the crossroads of community need and philanthropic support. We work very hard to earn donor trust to help them make thoughtful giving choices.

We offer several opportunities for donors to meet Foundation staff and learn more about using The Foundation to enhance their charitable giving.

**Donor Dish** provides an overview of services and programs available, while **Donor Insider** provides quarterly updates on The Foundation's grant-making activity. Both sessions are free of charge and are offered with no pressure or obligation. Dates/times vary. Please consult our website or call (814) 454-0843 to find out how you can improve your philanthropic support by leveraging The Foundation to your advantage.

## Online News

The Erie Community Foundation will unveil a brand new website at the Nonprofit Partnership Day on October 21. Kevin Moore, vice president of stewardship, will host special meetings for donors who wish to use our website to view funds, make a gift or direct a grant.

On facebook, The Erie Community Foundation has over 800 fans. You can become a fan too via [www.facebook.com](http://www.facebook.com). Also, to see the latest happenings at The Foundation, check out our videos on YouTube by searching for **ecferiepa**.



## Affiliate News

The Union City Community Foundation recently hosted its annual meeting, which celebrated its successful grant making. Pictured at the event are: Steve Jones, board trustee of The Union City Community Foundation, and Little League officials: Larry Hyer, vice president; Doug Hopson, treasurer; Chip Webster, Bill Mangel and Steve Gilbert, president.



The Erie  
Community  
Foundation

*Helping today... Shaping tomorrow.*

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### **The Erie Community Foundation**

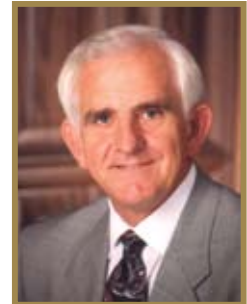
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Council of Foundations Seal of Approval

## SPECIAL THANKS FOR 2009!

**William M. Hilbert Sr.** completed his term as the chairman of the Board of Trustees in 2008. He served as a dedicated Board Trustee from 1998 to 2009. His vision for board direction was most valuable.



**Edward P. Junker III**, recently retired from the Board of Trustees after 17 years of service. He served as our board treasurer, and we thank him for his financial expertise and input. Ted will continue as a volunteer advisor to our finance committee.

**Lynn M. Kellogg**, who worked at The Foundation since 1999, retired in March of 2009 to spend more time with her husband, Jim, on the golf course. Over the years, she was promoted for her hard work and retired as our office manager.

