

# IMPACT

## Collaborations: Getting to the Heart of the Problem



*Collaborations are made, and ideas are shared during a recent Donor Dish session.*

"We can't do it alone," said foundation president Michael Batchelor. The Erie Community Foundation has formed Community Advisory Panels (CAPs) so that a broad cross-section of civic leadership can work together to examine barriers that limit increased access to quality early childhood education, workforce training opportunities and health care.

"This is a new way of doing business at The Erie Community Foundation," explained foundation chairman B.J. Lechner. "Trustees have allocated up to \$100,000 to each Community Advisory Panel. Our goal is to be a neutral convener and to encourage a collaborative approach to community problem-solving."

Each Community Advisory Panel is composed of local content experts and trustees of The Erie Community Foundation. "CAPs may take up to two years to fully understand an issue and to determine how foundation funds can best be leveraged," said Shiloh Turner, MPA, vice president of Programs. "We are currently identifying field-wide best practices and researching private foundation and governmental funding opportunities."

Recently, the Health Resources and Services Administration (HRSA) made a \$522,000 grant to Community Health Net to help expand its medical capacity. "This is a tangible result of the foundation's *Shaping Tomorrow* work," said Patty Stubber, Area Health Education Center director. "The community foundation was able to help make connections and build the bridges needed to make this collaborative work a reality."

"World macro-economic trends dramatically impact those less fortunate in our community," said Batchelor. "Trustees of The Erie Community Foundation have faith that good civic leaders, working together in a neutral setting, can develop the creative solutions needed to help our community be the best that it can be."



The Erie  
Community  
Foundation

*Helping today...Shaping tomorrow.*

### Community Advisory Panel Committee Members:

#### Early Childhood Education

Karen Bauer, Ph.D.  
Bill Jackson  
Nancy Kalista  
Carl Kallgren, Ph.D.  
Susan Kemenyffy  
Robert Oliver, Ph.D.  
Dennis Valone, Ph.D.  
Robert Wooler

#### Workforce

James Borelli  
John Elliot  
B.J. Lechner  
Linda Madara  
Dale McBrier  
Michele Zieziula

#### Health Care

Geoff Dunn, M.D.  
Bruce Gephardt, M.D.  
Andy Glass  
Charles "Boo" Hagerty  
Hank Hill, M.D.  
William McCarthy  
David Rubino, Ph.D.

# ERIE FREE TAXES EXCEEDS EXPECTATIONS OVER \$2.5 MILLION IN REFUNDS!



*"Awesome" "Phenomenal" "Most Successful Coalition Effort"*

Those were the words that Regis Bodnar of the Internal Revenue Service used to describe the success of Erie FREE Taxes in Western Pennsylvania. Because of the good work of Erie FREE Taxes, a project funded by The Erie Community Foundation, the government returned over \$2.5 million in total income tax refund dollars to Erie County residents.

"We are thrilled with the results, and we have had great success this year in increasing the number of taxpayers utilizing our free tax preparation sites," said Cheryl Bates, director of Erie FREE Taxes. "The outreach efforts of our program and community partners have been successful in presenting clear and accurate information about the Earned Income Tax Credit and free tax services to people who were not previously aware of the credit or perhaps were hesitant to claim it. By providing competent and professional tax service, we develop the respect and trust of the people we are here to serve."

Erie FREE Taxes started the tax season with a boost of a \$15,000 grant from the Wal-Mart Foundation. Wal-Mart worked with United Way and One Economy, a nonprofit organization that helps low-income workers with free tax preparation and filing services. "Through the Wal-Mart Foundation grant, we were able to help eligible local residents take advantage of tax credits, and provide them with opportunities to save money on tax preparation fees," Bates said.

Nationally, the IRS estimates that approximately 15-25 percent of

eligible individuals and families fail to claim the Earned Income Tax Credit (EITC), a refundable federal income tax credit for low to moderate income individuals and families. Erie FREE Taxes ensures that Erie City and County taxpayers know about the EITC and free tax filing assistance.

"This year, more than ever, families took advantage of every dollar made available to them," Bates added. "Thanks to local donors who have established charitable endowments with The Erie Community Foundation, we were able to do this work and make an impact."

2008 Tax Returns	1,761	49% increase
EITC Claims	911	61% increase
Refund Dollars	\$2,534,544	66% increase
EITC Dollars	\$1,357,769	68% increase

Direct deposits increased by 8%  
Rural returns increased by an estimated 166%  
City returns increased by an estimated 41%



## Being Poor for Just One Day Opens Eyes

Over 33,000 local residents live in poverty day in and day out. Their wages don't keep pace with rising costs. They struggle with tough choices between medicine and food. They deal with childcare and health care issues. They are overwhelmed.

To increase sensitivity to poverty, The Erie Community Foundation hosts poverty simulations across Erie County. The goal is to educate policy makers and civic leadership on real-life issues faced by those living in poverty. "The statistics are alarming, but until you actually step into someone's shoes for

a day, the statistics are just numbers without meaning," said Michael Batchelor, president of The Erie Community Foundation.

Recently, three groups (The Erie Women's Fund of The Erie Community Foundation, United

Way of Erie County Women In Action, and Greater Erie Community Action Committee) organized and participated in a poverty simulation. About 40 women learned how it feels to function with a shortage of money and an abundance of stress. Participants role-played the lives of low-income families, including single parents, people with disabilities and senior citizens on Social Security. The task of each family was to provide food, shelter and other basic necessities during four 15-minute "weeks."

"Although we used play money and fictional scenarios with time limits, the poverty simulation was not a game. We learned how to view poverty from different angles," said Beth Lewis, member of the Erie Women's Fund. "It was stressful, and a real eye opener!"

WJET-TV 24 and WICUTV12 covered the event. "After the poverty simulation, we had a chance to share our experience with each other, and most of the group felt they had a much better understanding of poverty, social services and government aid," said Donna Douglass, chairperson of the Erie Women's Fund.



# What *Money Works for You* Did For Me

## Meet Shelly Hofius

Imagine wanting to own a home, but not having the financial means or a good credit score, which are road blocks to the home ownership dream. The program, *Money Works for You*, which was the first jointly funded project of The Erie Community Foundation and the United Way, breaks down barriers by teaching financial literacy. To bring the project to fruition, six local nonprofits were awarded grant money including Saint Martin Center, Corry Higher Education Council, Advantage Credit Counseling Service, Stairways Behavioral Health, Erie Dawn and WQLN.

For the past two years, *Money Works for You* has made a difference to many Erie County residents... residents like Shelly Hofius. "My ultimate goal was to buy a home, but I didn't know where to start, and I didn't have

the means to achieve my dream," said Hofius.

Through *Money Works for You*, Hofius met Rebecca Outlaw, a certified housing counselor with St. Martin Center. "Shelly and I focused on her credit issues and cleared her credit report," said Outlaw. "Because Shelly diligently attended the financial literacy classes and consistently added to her Saint Martin Center's Family Savings Account, she was approved for a PHFA loan for a mortgage and found her dream home!"

"I can't believe that the closing for my very first home will be the end of June," Hofius said. "The classes at St. Martin Center taught me a lot about being a first-time homebuyer, and Rebecca was very helpful every step of the way!"

Additionally, *Money Works for You* improves the knowledge-base and skill level of agency staff helping low-income working families.



*Thrilled to be purchasing her new home with the help of Money Works for You and Saint Martin Center is Shelly Hofius, who is holding her daughter Laneeya Marsh. In the center is Rebecca Outlaw from Saint Martin Center, and Hofius's fiancée Brandon Marsh and daughters Jana Marsh (5) and Ar'Myani Marsh (4).*

"Working with Shelly was very gratifying because we were able to decrease her debts and increase her savings and find her a home," said Outlaw. "When I meet and help people like Shelly, my job is most satisfying."



## Family Charities Shift Assets to Donor Advised Funds

Nationwide, philanthropy is undergoing an interesting, but not unexpected trend. *The Wall Street Journal* recently reported that donors are increasingly unwinding their private foundations and turning to donor advised funds to accomplish their philanthropic objectives. Donors who invest assets with a community foundation through a donor advised fund, still make grant recommendations to charities.

"Much of this shift has been spurred by tough economic times, challenging investment options, and growing fees for services," said Kevin Moore, vice president of stewardship at The Erie Community Foundation. "Donor advised funds are a cost-effective way to meet your charitable goals, while enjoying immediate tax deductions and eliminating administrative hassles. It's a great situation that really gives the donor the best of both worlds."

Through a donor advised fund, The Erie Community Foundation handles the administrative, legal,

accounting and investment services of a fund while providing research on specific charities or urgent community needs. Through a donor advised fund, donors can give many types of assets, including cash, securities and even art.

A scholarship fund has worked well for the Guelcher family, who established the Walter and Florence Guelcher Scholarship fund in memory of their parents in 2001. "Thanks to The Erie Community Foundation, the process is simple because they work with Gannon's Financial Aid Office, organize the scholarship applications and coordinate the review committee," said Tom Guelcher, one of the family members who established the fund. "Through our fund, the administrative work is eliminated. Once the final selection is made, it's rewarding to learn about the student who receives a scholarship in memory of my parents." To learn more, please contact Kevin Moore at (814) 454-0843.

# NONPROFITS BOOSTED BY \$243,750



Celebrate Erie, Downtown Edinboro Art & Music Festival, Blues & Jazz Festival, Erie's Heritage Festival and Erie Summer Festival of the Arts will again brighten our summer days thanks to grants made by local Erie Community Foundation donors.

"In tough economic times, those less fortunate turn to local charities to meet the basic needs of food, shelter and clothing," said Michael Batchelor, president of The Erie Community Foundation. "Yet, we also need our arts to inspire and our festivals to celebrate in order to maintain the quality of life in our community. To do so, our board focused on Arts, Culture and Quality of Life Grants granting \$243,750 to twenty nonprofits."



Mike Batchelor and Dr. Tony Snow presented Char Mashyna of ArtsErie with a \$15,000 check.

- ArtsErie — \$15,000
  - CAFÉ CelebrateErie — \$20,000
  - Community Access Television — \$5,000
  - Downtown Edinboro Art & Music Festival — \$5,000
  - Erie Art Museum Blues & Jazz Festival — \$10,000
  - Erie County Historical Society & Museums Erie's Heritage Festival — \$15,000
  - Erie County Public Library Foundation — \$20,000
  - Erie Philharmonic — \$7,950
  - Erie Playhouse — \$15,000
  - Erie Summer Festival for the Arts — \$5,000
  - ExpERIENCE Children's Museum — \$25,000
  - JazzErie Dave Brubeck Jazz Concert — \$5,000
  - Lake Erie Fanfare, Inc. — \$5,000
  - Lake Shore Railway Historical Society, Inc. — \$10,000
  - McCord Memorial Library — \$25,000
  - Stairways Behavioral Health Center for Arts & Humanities — \$30,000
  - Wattsburg Agricultural Society — \$4,000
  - World War II Memorial Monument — \$3,500
  - YADO/ Pennsylvania Chamber Symphony — \$15,000
- EMERGENCY GRANT:
- Foundation for Free Enterprise Education's HVAC Replacement — \$3,300

## Batchelor Selected to Serve

The Council on Foundations announced that Michael Batchelor, president of The Erie Community Foundation, has been elected to serve a three-year term on the Community Foundation Leadership Team. The nation's 700 community foundations participate in a voting process to choose members. The Leadership Team works with the Council to establish policy, technical assistance programming and field-wide best practices for United States community foundations. This is Batchelor's second term as an elected member.

## MINI GRANTS MAKE MACRO IMPACT

In collaboration with Erie Weed & Seed, The Erie Community Foundation announced a third year of \$500 neighborhood mini-grants for Erie totaling \$20,000.

"Little things mean a lot," said Sue Moyer, executive director of the Bayfront East Side Taskforce. "We use grant dollars not only to promote neighborhood beautification, but also to encourage civic engagement and to develop neighborhood pride—because studies show that a sense of neighborhood pride even cuts down on crime."

Mini-grant applications were due to Erie Weed & Seed on June 12. A diverse, community-wide committee will review the grant applications.

"We strongly believe in collaborating with other funders," said Michael Batchelor, president of The Erie Community Foundation. "For the neighborhood mini-grants, Erie Weed & Seed is a natural partner because they already work with neighborhood groups and they know where there is the greatest need."



Pictured at the Mayor's Press Conference are: Michael Batchelor, president of The Erie Community Foundation, Sue Moyer of Bayfront Eastside Taskforce, Stef Chatman of Erie Weed & Seed, David González, program officer of The Erie Community Foundation, Dave Deter of the City of Erie.

# Foundation Earns National Gold and Local Bronze!

The national Wilmer Shields Rich Awards Program awarded The Erie Community Foundation with a gold award in the category of public policy. "This recognized the totality of our work including Erie FREE Taxes, Poverty Study, Poverty Simulations, Gaps Analysis Report, Access to Health Care and Policy Forum. We thank all the

dozens of volunteers, staff and donors whose dedication made this happen," said foundation president Michael Batchelor. The award was presented in early May at the Council on Foundations annual meeting. Other community foundations receiving gold awards in this category were the Cleveland

Foundation and the Silicon Valley Community Foundation.

Locally, the Erie Advertising Club honored The Erie Community Foundation with a bronze award for the *All we need is a seed...* newspaper campaign. Each week, the Erie Times News featured donors and nonprofit executives holding the infamous acorns.

## Calendar of Events:

- July 8 Grant Writing Workshop
- July 30 Scholarship Reception
- Aug. 3 Health & Environment Grant Application Deadline
- Aug. 6 The Erie Community Foundation Annual Meeting
- Aug. 7 Day for You at the Zoo
- Sept. 30 Grant Writing Workshop
- Oct. 16 Education Grant Application Deadline
- Oct. 21 Nonprofit Partnership Day

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



## HOW TO SURVIVE THE ECONOMIC DOWNTURN

*Series presented by The Nonprofit Partnership*

With the weakening economy and the outcomes it has for communities in the Lake Erie region, nonprofit organizations find themselves facing more demands with fewer resources. The Nonprofit Partnership offers a special summer series of capacity-building programs specifically designed to provide the area's nonprofit sector with a greater understanding of how the economic environment will affect them, as well as equip them with the tools they need to survive. If you are on a nonprofit board or work for a nonprofit organization, consider attending the series composed of the following events:

- June 23 Partnerships, Collaborations, and Mergers
- July 7 Marketing Maxims that Foster Corporate Sponsorships and Giving
- July 21 How to Effectively Research Grant Opportunities
- Aug. 4 Effective Grant Writing
- Aug. 18 Understanding the Federal Economic Stimulus



More information can be found at [www.thenonprofitpartnership.org](http://www.thenonprofitpartnership.org).

Inspired by their involvement in ABC's "Extreme Makeover: Home Edition," the Maleno family established the Maleno Family-to-Family Fund at The Erie Community Foundation to support future building and renovation projects for Erie families and neighborhoods. St. Martin Center will be instrumental in finding families in need.



*Pictured at a recent press conference are: Mayor Joe Sinnot, John Maleno, Michael Batchelor, president of The Erie Community Foundation, Cheryl Kobel, executive director of St. Martin Center and Attorney Bob Dwyer, board trustee of The Erie Community Foundation. The ABC project begins on June 25th when a home will be constructed in just one week!*



The Erie  
Community  
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Council of Foundations Seal of Approval



## IN HIS OWN WORDS



*Pictured are  
Donna Buseck,  
Mike Batchelor  
and Justin Fallon*

"Just giving up our tips is going to make a difference in the lives of those who are less fortunate," said Justin Fallon, who works at a local pizzeria and just completed his sophomore year at Mercyhurst College. "Our professor asked us to design a social action project to help an organization that helps others. I simply asked my co-workers if they would be willing to give up their tips, and everyone agreed. We were able to quickly raise \$70, which we are contributing to the Erie Women's Fund because of their efforts to combat poverty in our community. It was so easy and so rewarding to become involved with The Erie Community Foundation!"



Become a fan of The Erie Community Foundation on Facebook! Join our 550 plus fans who are updated regularly with good news and events!