

Washington County Community Foundation

The Community Heirloom 2022



Helping You Give . . . Close to Home



E. Alex Paris, III

Serving as Chairman of the Board of the Washington County Community Foundation has enabled me to gain a deeper understanding and appreciation for the Foundation's charitable work as a *grantmaker*, *fundraiser*, *donor service organization*, and a *community leader*.

In the *grantmaking* area, we were very pleased to award over \$3.6 million in grants in 2022. A significant component of our overall grant-making was for capacity-building grants which seek to increase a nonprofit's operational, programmatic, financial, or organizational maturity. This emphasis on capacity-building grants will remain a priority area for us as we have seen how transformational previous grants have been.

In the *fundraising* area, contributions totaled more than \$3.2 million for the year. For organizations like the Washington County Community Foundation which focus their fundraising efforts on building a growing endowment for the community, the unfavorable market conditions in 2022 were a challenge and resulted in an overall decrease in our grantmaking endowment. However, continual adherence to our Investment Policy, which calls for a diversified investment portfolio, served us well during a difficult investment year.

In the *donor service* area, we assisted donors in creating seven new permanent funds with diverse charitable purposes. The ***African American Community Fund*** will benefit African Americans in Washington County. Richard and Regina Beinhauer will periodically recommend grants from the donor advised ***Beinhauer Family Fund***.



WCCF Treasurer Richard White and WCCF Chairman Alex Paris pose with Dr. Howard Jack Outstanding Public Educator Award recipient Joelle Cooper at Avella High.

Message

The ***Betty Drach Internship Fund*** will provide grants to area nonprofits to provide a monetary stipend to students who are working for the nonprofit and are enrolled in a post-secondary education program. Grants from the ***Charles, Mary & Adda May Johnson Fund*** will support programs addressing food insecurity, vision services, or craniofacial disorders.

A committee of donors will recommend grants from the ***GIVE Washington County Fund*** which was initiated by the EQT Foundation. Grants from the ***Jacie Alexa Academic Fund*** will be provided to Trinity Area School District to assist financially-needy students of Trinity High School with preparing for, or gaining access to, post-secondary education.

And the ***Jean McStea Phelan Fund*** will provide grants to the Church of the Covenant, Citizens Library, Muskingum University, and the Washington Hospital Foundation.

The diversity of these fund purposes illustrates the flexibility of the Foundation to assist donors in creating funds to support the causes for which they are most passionate. You may read more about these new funds on the Foundation's website at www.wccf.net.

In the *community leadership* area, significant progress was made during the year to secure the necessary funding for our newest leadership project, the *Community Snapshot*. Our signature leadership project, *WCCF Gives*, celebrated a 10-year anniversary and surpassed \$10,000,000 in cumulative grants in 2022!

One of the elements of the position I enjoy most is having the opportunity to recognize community leaders who are making a difference. I had the honor of presenting several Community Foundation awards to outstanding members of our community.

It was a good year for the Foundation, made possible by the generosity of our many donors, the support of our community, and the dedication of our Board and Staff. We look forward to continued progress in the coming year.

E. Alex Paris, Chairman of the Board



Past WCCF Chairman Edward Morascyzk accepting the Keller Corporate Award on behalf of the Falconi Family of Businesses and WCCF Chairman Alex Paris.

Golden Oak Guild

The *Golden Oak Guild* recognizes donors who have made operational gifts to the Foundation at a leadership level. Members of the *Golden Oak Guild* contributed over \$100,000 in 2022 and over \$500,000 since 2017! Without their generosity many of our charitable services would not be possible.

Members as of December 31, 2022

White Oak - Minimum \$50,000

CNX Resources Corporation

Chestnut Oak - Minimum \$10,000

Alex E. Paris Contracting Company

Marty & Judy Beichner

William & Carolyn Campbell

CONSOL Cares Foundation

Kris Drach & Chuck Kreuzer

Edward & Elaine Morascyzk

Patrick & Christine O'Brien

South Hills Toyota

Ten Mile Paving

Richard & Margaret White

Cherrybark Oak - Minimum \$5,000

84 Lumber

ANSYS

John & Barbara Campbell

Mark & Nan Campbell

Judge Thomas & Rachel Gladden

Thomas F. & Karen J. Hoffman

Jeff & Geraldine Jones

William T. Allison, Jr.

Sheryl & Jim Leckie

James & Rachel McCune

C.S. McKee

E. Alex & Valerie Paris

Dr. Wayne & Cindy Pfrimmer

Richard* & Jean* Phelan

James & Nancy Proudfit

Gwendolyn Simmons

Steven & Lynne Stout

Jack & Betsie Trew

Waller Corporation

David & Barbara Wylie

Roy J. Zoog

Willow Oak - Minimum \$20,000

EQT Foundation

Pin Oak - Minimum \$2,500

Anonymous

Dr. & Mrs. Jon S. Adler

Michael S. Anderson &

Kelly J. Dollins

The Bails Richardson Family

David & Marie Brehm

Nan J. Cameron

Megan Chicone & Nathan Boxx

EQT Corporation

Molly & Tom Crooks

John & Diane DiSalle

Mary Lea & Dennis Dutton

EQT Corporation

Barbara Graham

Randy & Sandy Guthrie

Alex & Tammy Hardy

Joseph & Shirley Hardy

Scott Horne

Richard P. & Ivana G. Liberatore

The Sam* & Bev Minor Family

Andrew & Jill McIlvaine

Edward Melvin Morascyzk*

John & Rose Northrop

Thomas & Peggy Northrop

Karen Randolph*

Three Rivers Royalty

Alexander & Michelle Reyes

Kurt Salvatori

Dr. E. Ronald Salvitti

Brian* & Sherri Smith

SMS Partners

Bill & Sandy Stout

John & Dorothy Tecklenburg

Washington Financial Bank

**Deceased*

Assessing Community Needs



Much progress has been made in the first year of our three-year *Strategic Plan*, most notably regarding our newest leadership initiative, the *Community Snapshot*. Using a very non-traditional approach to a community needs assessment, we sought to create a tool that would be readily accessible and useful to our donors, institutional funders, community leaders, government officials, and the general community, on an ongoing basis.

In addition to assessing needs at the community level, we also wanted to provide the opportunity for local nonprofits to identify the greatest needs of their specific nonprofit. We know that strong nonprofits build strong communities, so this unique feature of a needs assessment was an extremely important component of our approach.

In 2022 we were fortunate to have secured funding to begin this project, which included plans to convene focus groups and issue a community-wide survey to ensure that a broad cross-section of the community was represented in the assessment.

The new website, communitysnapshot.org, which is expected to launch in 2023, will be organized in eight broad interest areas that align with the funding areas of the Community Foundation. On each of the focus area pages, there will be links to other websites where additional data may be obtained.

To the best of our knowledge, never before has a comprehensive community-wide needs assessment been conducted for Washington County, nor has there ever been a centralized location for community data. We are grateful to the donors who made the project possible, to the many local organizations who graciously shared the data they were already assessing, and to the many community members who expressed interest in participating in the project.

Focus Areas

Animal Welfare

Arts & Humanities

***Community Improvement &
Economic Development***

Conservation & Environment

Education

Health & Fitness

Human Needs

Religion & Faith-Based

Making a Strategic and Lasting Difference

In my more than two decades at the Community Foundation, I have had the wonderful privilege of working with many very dedicated and talented community leaders. While many Trustees encouraged me to grow the assets of the Community Foundation, no Trustee ever challenged me more than Brian

Smith. He challenged me to think more strategically and more impactfully to increase our charitable assets.



Brian Smith and his wife Sherri at the 2016 Philanthropy Banquet.

Brian not only challenged me, but he also helped me to be successful. He devoted many hours over many years to help me to secure the largest gift in our history. That gift transformed our grantmaking and enabled us to begin issuing capacity-building grants to enable local charities to be more strategic and impactful. And it was he who was first to commit Washington Financial to a \$25,000 sponsorship of the day of giving bonus pool, IF I could secure other gifts to reach the \$100,000 goal. Challenge accepted!

Known to many as a successful businessman and bank president focused on the bottom line, Brian also cared deeply about our community and used his position to help local charities. One of the most compelling statements he made on our behalf was "a community is best served when its charitable assets remain in the community. The Washington County Community Foundation is our local vehicle for managing both long-term and short-term charitable assets and in this role has proven itself to be a community asset."

Brian was particularly drawn to charities that served disadvantaged children. You could see that in the charities he and his wife Sherri supported through *WCCF Gives*, and you could see that in his board service. He was President of the Try-Again Homes Board for many years, and helped to merge the organization into Blueprints when it was clear that more children could be served by the merger. After the Community Foundation made a grant to initiate an afterschool music program for needy students at the Washington Jazz Society, Brian donated his trombone to the Society to support a young musician.

Message

Securing the initial \$100,000 bonus pool for *WCCF Gives* was a challenge as the day of giving concept was new to Washington County and many were skeptical that it could be successful in our community. I focused my fund-raising efforts on institutional supporters who contributed \$70,000, but time was running out and I wasn't certain if we would meet Brian's challenge.

Thanks to Richard Phelan and Jean McStea Phelan we did meet that challenge. That their one gift would help more than 100 charities, and that they could do so anonymously, appealed to Richard and Jean. Their initial and continued support of *WCCF Gives* provided the resources for the various contests we held in conjunction with *WCCF Gives* over the years, including the most recent *Get Your Board On Board* contest.

Richard and Jean were already generous donors to the Community Foundation. They had utilized us to maintain their anonymity to provide significant pass-through gifts to several local organizations. They had also created the perpetual **Chambers-Phelan Fund**, to support the Liberty United Methodist Church in Washington, which many of Richard's Chambers ancestors had attended. With Jean's Scotch-Irish ancestry, they became leadership members of the *Samuel T. Brownlee Society*, and when we held our inaugural Brownlee Yuletide, Jean proudly displayed her Scotch-Irish ancestry arriving at the event with her tartan scarf, plaid skirt, and tam beret.



*Richard and Jean McStea Phelan at the
2017 Legacy Luncheon*

They also provided very generous operational gifts to grow the Foundation and are members of our *Golden Oak Guild*. Richard passed in 2019, but Jean continued to support the Community Foundation annually. Shortly before she passed in 2022, Jean created the *Jean McStea Phelan Fund* to support several charities that were especially important to her.

I am so very grateful to have known Brian, Richard and Jean and for the opportunity to work closely with them over the years. Although they are no longer with us, the lasting impact of their strategic leadership and generosity is evident throughout the community, most notably through the continued success of *WCCF Gives*.

Recognizing Community Service

The *Northrop Family Excellence Award for Community Philanthropy* was awarded to Kris Drach, a longtime volunteer for Literacy Council of Southwestern Pennsylvania. This award recognizes local philanthropists for exceptional generosity to the Washington County community.

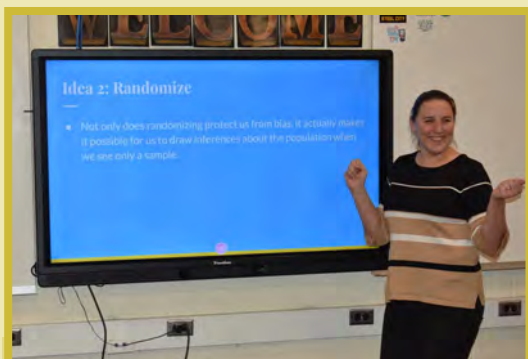


Dr. Geraldine Jones, former president of PennWest California, received the *Louis E. Waller Humanitarian of the Year* award. This award recognizes a local individual devoted to the promotion of human welfare and the advancement of social reforms.



Dr. Geraldine Jones and Kris Drach share a moment of amusement together during a reception honoring their achievements. The reception, hosted at the Brownlee House, brought together the honorees' families, friends, and WCCF representatives to celebrate the contributions made to the local Washington community by two incredible people.

& Philanthropic Excellence



Mrs. Cooper teaching a statistics lesson to her Advanced Placement students.

Joelle Cooper, a math teacher at Avella High School, received the *Dr. Howard Jack Outstanding Public Educator Award*. This award is given to a public educator who has displayed the ability to inspire children from all backgrounds and abilities, earned the respect of colleagues, students, and parents, and is actively engaged in the community.

The Falconi Family of Businesses was awarded the *Charles C. Keller Award for Corporate Philanthropy*. This award is given to a business that supports the community, not only financially, but with staff time and local leadership, and works to address community needs.



Representatives of the Falconi Family of Businesses at the award reception.



The LeMoyne House, one of several properties maintained by the WCHS.

The Washington County Historical Society (WCHS) received the *President's Choice Award*. The goal of the award is to assist a small but improving charity the way the Foundation was helped by its earliest supporters.

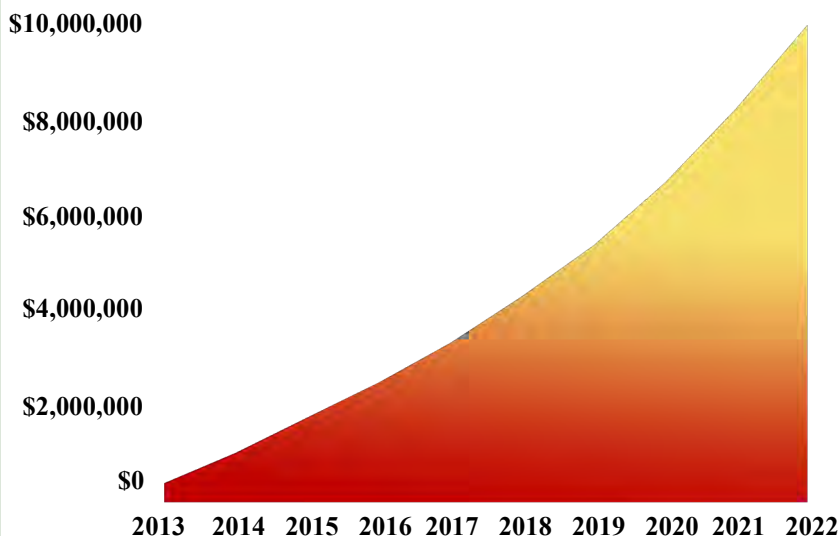
Continuing Impact

From the Foundation's inception, we wanted to support many of our local charities in a significant way. But in 2013 our grant-making assets were limited, which restricted the number of charities that we could support each year. Hosting a day of giving enabled us to provide unrestricted grants to more than 100 local charities. Even though our grant-making assets have grown over time, *WCCF Gives* is still the activity that enables us to support the greatest number of charities each year. The event has grown every year and over the past ten years has provided \$10,000,000 in *Gives* grants!

Looking ahead, we're committed to continuously improving and enhancing *WCCF Gives*. We're currently in the process of refreshing the *WCCF Gives* website (www.wccfgives.org) with a simplified presentation, a new logo and a new color palette. Additionally, we are planning to introduce more charity education opportunities to help participants maximize the potential of this event as well as to strengthen their overall operations.

WCCF Gives ~ Bringing Good People and Good Causes Together

WCCF Gives: 10 Years & \$10 Million in Cumulative Grant-Making!



Gives Keeps Growing: The graph above shows the incredible growth of *WCCF Gives* throughout its ten-year history. The cumulative grant-making total includes all pass-through contributions received in response to *WCCF Gives*, bonus pool dollars, as well as other incentives offered in conjunction with the Foundation's *Gives Day* program.

New Fund - New Impact

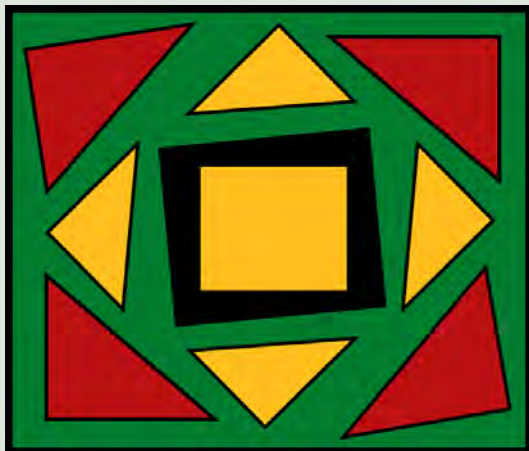
As Juneteenth was approaching in 2022, we met with a donor couple regarding a prospective fund they were considering. Fully aware of the ongoing struggles of African Americans across the country, they were very interested in creating a permanent fund that would benefit African Americans in Washington County. But they were not sure how the fund should be structured.

Certainly, cultural celebrations such as Juneteenth should be supported, but they also had an interest in education, community development, history and entrepreneurship. How best to structure the fund for optimal impact?

After several iterations of the fund parameters, it was determined that the ***African American Community Fund*** would provide grants in five broad categories: *Cultural Heritage, Education & Enrichment, Community Development, History & Preservation, and Entrepreneurship*. A primary goal of the Fund is to empower community members to think creatively to design or sustain programs and projects for the African American community.

Conversations with a few other donors capable of making leadership gifts were successful and by year's end the ***African American Community Fund*** was valued at nearly \$100,000. It will issue its first grant in 2023.

The fund accepts contributions on an ongoing basis, so if you also would like to help support African Americans in Washington County, please consider making a donation to the Fund today or by bequest.



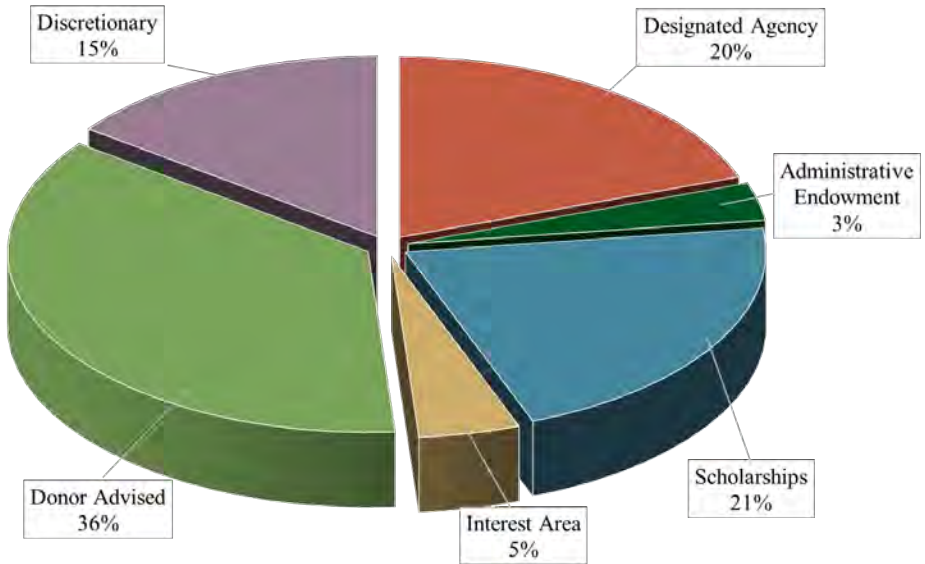
The African American Community Fund logo is inspired by traditional patchwork quilts.

African American Community Fund
*Honoring the Past, Present and Future of the
African American Community in Washington County*

Financial Trends

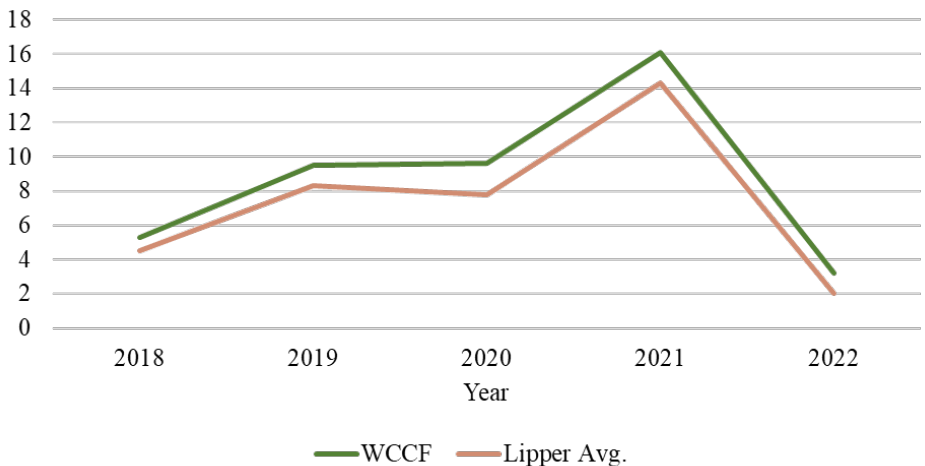
As a service to donors, we provide a variety of permanent charitable fund options. Many funds are created during a donor's lifetime with provisions made for a testamentary gift to increase the fund's value in the future.

Endowment Fund Types



Market conditions were a challenge in 2022 but our investment portfolio consistently has outperformed the Lipper Average.

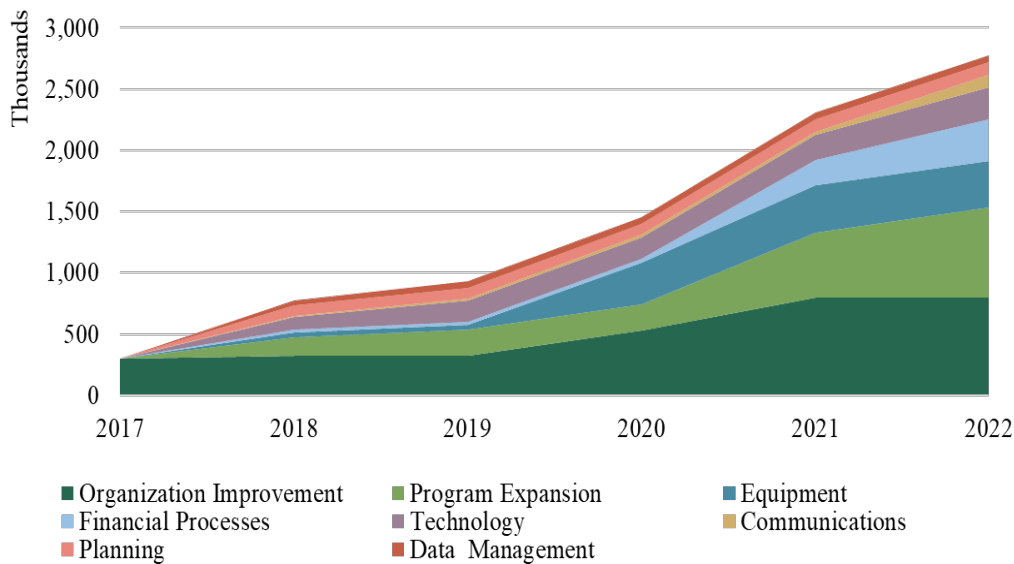
WCCF Three-Year Average Return vs Lipper Average



and Highlights

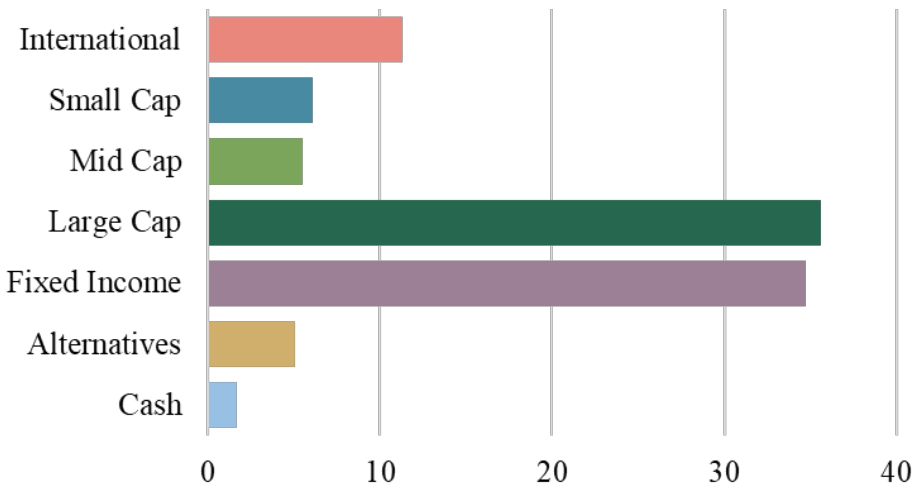
Since we launched our capacity-building grant initiative in late 2017, more than \$4.4 million has been issued to increase the capacity of local nonprofits.

Cumulative Capacity Building Grants



We maintain a diversified investment portfolio and regularly meet with investment managers to ensure compliance with our Investment Policy.

Investment Portfolio Mix



Acorn to Oak Trustee Reception



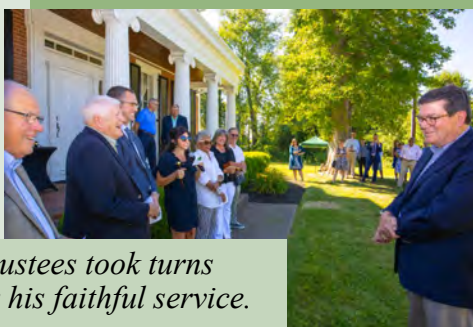
A charming setting: Trustees mix and mingle around the Brownlee House.

Last June, on a gorgeous summer day at the Brownlee House, the Foundation held its inaugural *Acorn to Oak Trustee Reception* to honor past and present Trustees, and to welcome incoming Trustees.

The Foundation works diligently to maintain a highly skilled and dedicated Board of Trustees who geographically represent our service area of Washington County. Annually, the Foundation's Governance Committee assesses the composition of the Board and then identifies prospective Trustees to replace the skill set of Trustees rotating off the Board.

Trustees serve a three-year term and are eligible to serve three consecutive terms for a total of nine years. Occasionally, a Trustee may return to the Board after a required one-year hiatus off the Board. One such Trustee who returned to the Board was James McCune. While Jim rotated off the Board a few times, his active involvement with the Foundation never ceased. At the *Acorn to Oak Trustee Reception*, current Trustees paid tribute to Jim for his more than 27 years of service to the Foundation. Jim served as the Foundation's inaugural Chairman of the Board in 1995 and served again as Chairman from July 2019 to June 2022. He is the only Trustee who has ever served twice as Board Chairman.

The reception also included special presentations to express gratitude to outgoing Trustees and a symbolic "passing of the gavel" to incoming Chairman E. Alex Paris.



Members of the Board of Trustees took turns recognizing Jim McCune for his faithful service.

WCCF Board of Trustees

E. Alex Paris, III,
Chairman
Alex E. Paris Contracting

Barbara A. Graham,
Secretary
Peacock Keller

Michael S. Anderson,
Vice Chairman
Imperial Tax South Hills

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Tammy L. Hardy, Hardy Enterprises
Todd M. James, EQT
*Geraldine M. Jones, California University of PA**
*Mary Ellen Jutca, Trinity School District**
*Debra E. Keefer, Mon Valley Regional Chamber**
Lars U. Lange, West Bethlehem Township Supervisor/Lawyer
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James H. McCune, Bowles Rice
*Thomas P. Northrop, Observer Publishing Company**
Joseph M. Piszczor, Stein Wealth Advisors
Kurt R. Salvatori, CONSOL Energy
*Harlan G. Shober, Jr., Washington County Commissioner**
Dorothy F. Tecklenburg, Corporate Communications Consultant
Amy L. Todd, Intermediate Unit I
Joseph H. Young, TForce Freight

**Retired*

Betsie Trew, President & CEO
Emily Fox, Communications Associate
Megan Fabyonic, Content Creator

Washington County Community Foundation
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**The Washington County Community Foundation seeks to
improve the quality of life in Washington County by
promoting and facilitating philanthropy.**



**Washington County
Community Foundation**

Helping You Give . . . Close to Home

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