

Our Mission

To develop, receive, administer and manage, under community control, funds received from public and private sources and distribute them for charitable purposes, primarily to meet local needs.

2019 LOOK BACK



A COMMUNITY
FOUNDATION

4 Sentry Parkway East, Suite 302, Blue Bell, PA 19422

Features Include: The Status of Women in Montgomery County, Grants and Scholarship Recipients, 2019 Women and Leadership, Educational Opportunities, Nonprofit Clinics, National Philanthropy Day, Women's Executive Directors' Roundtable

Our Role as a Community Catalyst, Foundant Technologies: The Software of Philanthropy, National Standards, Our Growing Team, Women's Leadership Council, and New Board Members!

To Learn More about the Foundation, Please Contact: 484-532-7387

www.mcfoundationinc.org



FROM THE PRESIDENT

A Year Of Working For Critical Impact: **Harnessing The Power Of Giving**

Dear Friends of the Foundation,

The Montgomery County Foundation, Inc. works to promote responsible philanthropy, connect donors to causes that matter to them, and enhance the lives of those who are most in need.

Research, public-private collaborations, grants to nonprofits, enhancement of programming for STEM students, new funds, and many other exciting projects filled 2019. We are proud to have received National Standards Certification again, which is a significant process, and underscores our commitment to excellence.

2019 was also a year of growth for the Foundation. The addition of two new team members will increase our efficiency, enable us to encourage new donors to join us in addressing important causes, and help grow our unrestricted assets to benefit the community.

We have continued to focus the majority of our grantmaking on operating funds for nonprofits. Unlike many grants that are restricted for specific projects, our operating grants benefit the nonprofits by providing them flexibility of use.

As an example, we are pleased to have provided grants to an organization that provides special education services for students with specialized needs.

The results mean that a student who is in the STEM program is able to find work in a computer company willing to provide some assistance in the workplace. Another grant is helping an agency provide services to children and families through educational, legal, and advocacy services to prevent child abuse and neglect.

Other grants were provided to offer educational programs for professionals to enhance their understanding of traumas that their clients may have experienced. The Elder Access to Justice day-long seminar for professionals in the field was another example where grants are making a difference in all areas of human services.

For 2020, the Foundation will focus on new areas of importance like Workforce Development, Interfaith Collaborations, and the development of a Community Impact Fund. Of special focus will be cause-related funds like the Your Way Home Field of Interest Fund. We have welcomed other new funds and their first distributions will be in 2020.

We thank all of our supporters, our partners, and our volunteers for their commitment to making a critical impact and achieving our philanthropic goals!

Virginia Frantz
President & CEO

The Status of Women in Montgomery County, Pennsylvania

The full report and the Executive Summary are available on the Foundation's website:

www.mcfoundationinc.org/researchstudy.asp

The Foundation launched “**The Status of Women in Montgomery County, Pennsylvania: 2018 Report**” in April 2019. This initiative is in line with the Foundation’s role as a *Catalyst for Community Solutions*: exploring, identifying and addressing important needs and opportunities for growth and change in the County.

The Foundation commissioned this study, conducted by the West Chester University Center for Social and Economic Policy Research, to provide an invaluable tool for individuals and organizations interested in improving the well-being of women in Montgomery County. The report is an in-depth baseline needs assessment of women in the County, and explores eight major areas affecting the lives of women: *employment and earnings; work and family; poverty and opportunity; health and well-being; reproductive rights and infant health; violence and safety; political participation; and women veterans.*

The Foundation hosted a meeting of community leaders to present key findings and facilitate a discussion about significant trends and challenges that women face in Montgomery County. The Foundation held other meetings at different community centers in the County to share the results of the research report and to disseminate information about the areas where additional improvements remain critical, and discuss how organizations, community leaders and policymakers can use this report to improve disparities that exist for girls and women in the County.

The report was funded by The Montgomery County Foundation, Inc., the Arcadia Foundation, and the Pennsylvania Department of Education. The Foundation thanks the funders as well as the organizations and community members who gave their time to participate in surveys, interviews and focus groups.



PUBLIC LAUNCH AT ACLAMO - POTTSTOWN



COMMUNITY LEADERS GATHER AT THE FOUNDATION'S OFFICES

Grants: Strengthening Our Communities

GENERAL DISTRIBUTION FUND

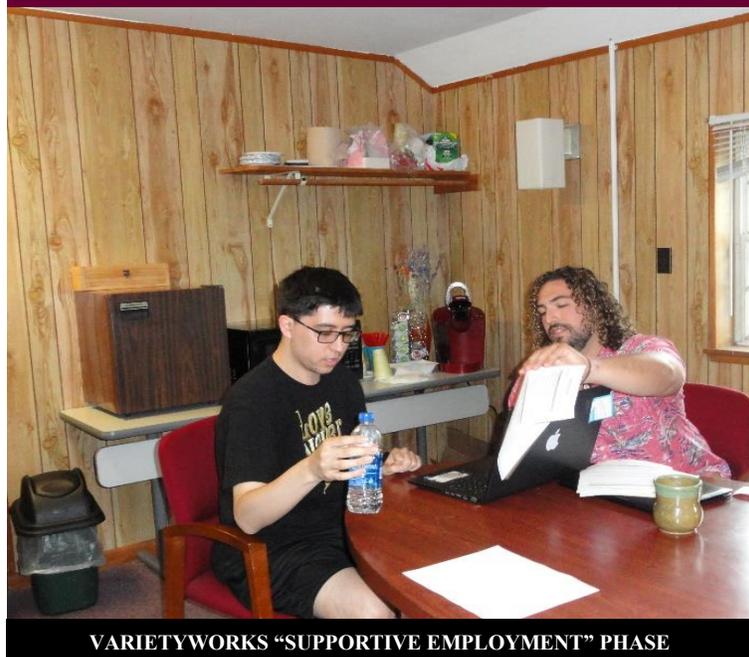


BREATHING ROOM FOUNDATION

The Foundation's General Distribution Fund's 2019 cycle opened with an initial Letter of Intent (LOI) round. This Fund provides grants to nonprofit organizations focused on arts and culture, human services, public benefit societies and the environment. The Foundation received 68 LOI's of which 27 were invited to submit a full proposal. The Foundation awarded grants for General Operating Support to the following organizations:

- Breathing Room Foundation
- Interfaith Hospitality Network of the Main Line
- Inter-Faith Housing Alliance
- Korean Americans for Civic Participation
- Manna on Main Street
- Montgomery Child Advocacy Project
- National Audubon Society
- North Wales Area Library
- Options in Aging
- Sebastian Riding Associates
- Southeast Pennsylvania Symphony Orchestra
- Willow Grove Community Development Corporation
- Women's Center of Montgomery County

THE MBF CENTER FUND

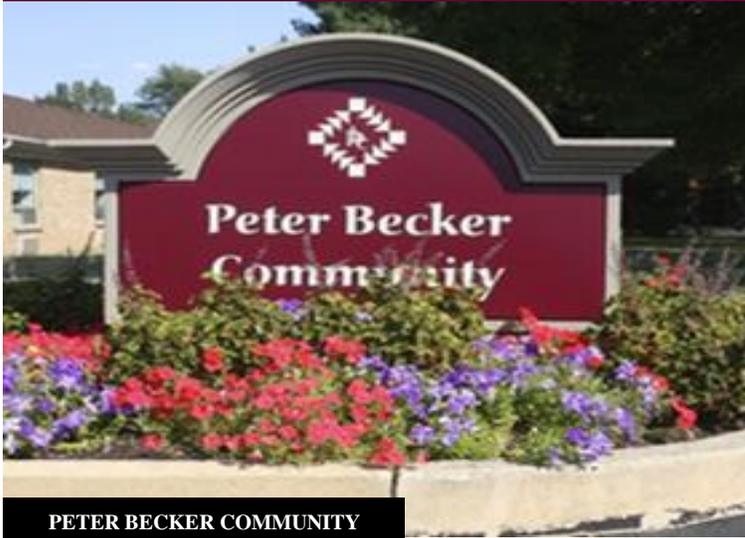


VARIETYWORKS "SUPPORTIVE EMPLOYMENT" PHASE

The **MBF Center Fund** supports charitable organizations that improve the quality of life for people with physical disabilities, including education and training in computer studies and related fields. This Fund helps empower individuals with disabilities to lead independent and productive lives. In 2019, the Foundation awarded grants to the following organizations:

- Hedwig House
- JEVS Human Services
- Pathway School
- Variety – The Children's Charity of the Delaware Valley

GRANT HIGHLIGHTS



PETER BECKER COMMUNITY

The Foundation administers many donor established funds, which provided numerous grants to a number of organizations in 2019 including the following:

- North Wales Area Library
- Children's Hospital of Philadelphia
- Arcadia University
- The Salvation Army – Pottstown
- The Center for Loss and Bereavement
- ACLAMO Family Centers
- Cecil and Grace Bean Soup Kitchen
- Riverbend EEC
- Daily Bread Food Pantry
- Brother House
- Missionary Sisters of Charity
- Montgomery County – Norristown Public Library
- Colonial Neighborhood Council
- YWCA Tri-County Pottstown
- Martha's Choice Marketplace
- Silver Springs - Martin Luther School
- Manna on Main Street
- Laurel House
- Legal Aid of Southeastern Pennsylvania
- Peter Becker Community
- Kencrest Centers
- Montgomery County Community College
- Bucks-Mont Collaborative
- Maternity Care Coalition
- Philadelphia Young Playwrights

NEW FUNDS



The Foundation is pleased to welcome the following to its family of funds:

- **Greater Norristown PAL Legacy Fund** - established to support the Norristown Youth Programs provided by the Montgomery County - Norristown Public Library.
- **Larry Anderson-King of Prussia Players Scholarship Fund** – established to provide scholarships for graduating seniors who are pursuing full-time college in Theater/Music.
- **Leading Women's Fund** – established for higher educational scholarships for women, educational conferences, seminars for women and other educational programs for women.
- The Foundation thanks the new **Legacy Donors**, who established gifts to the Foundation in their wills.

START YOUR OWN FUND

Please Contact us to Begin a New Philanthropic Journey and Provide Essential Support for the Community!

2019 Women and Leadership Forum: Taking Charge of Change!



PHOTO CREDIT: A. E. HINE III

Nearly 300 current and aspiring leaders registered for the sold-out 2019 Women and Leadership Forum. Participants were leaders from a wide range of professional backgrounds- non-profit, academic, corporate, private and public organizations. It was a powerful day of education, inspiration and networking for all.

The program's theme was **"Taking Charge of Change"** and the event featured three nationally acclaimed speakers discussing how women leaders could navigate changes in their personal and professional lives. **Sheryl Williams**, founder of *SheWillLead*, provided insights into how to lead in a multigenerational workplace through effective communications across generations; **Lisa Lord** of *Lisa Lord Consulting* provided attendees a view into how people process change and how to embrace change; and **Cheryl Rice**, founder of the *You Matter Marathon* movement, discussed how to transform your inner critic into your inner champion to achieve your full potential.

The Foundation's prestigious award for "Woman of Distinction" was presented to **Tamala Edwards**, co-anchor of Action News Mornings, channel 6abc, for not only leadership in her field, but also her dedication to serving and improving the community. In addition, the Foundation's 2019 "Critical Impact Award" was presented to **Nanette and Kary LaFors**, who have led "Advocates Against Hunger" to alleviate food insecurity in Montgomery County, and "Living Waters For the World" to bring clean water to developing areas globally.

The honorees presented remarks about their own inspiring journeys, and were presented proclamations from State Senators and Representatives, and Montgomery County Commissioners' office. In honor of the Woman of Distinction award, checks were presented to two organizations of Ms. Edwards' choice: Maternity Care Coalition and Philadelphia Young Playwrights.

Since the color of change is **orange**, there were splashes of the color **orange** throughout the event, with centerpieces of fresh **oranges**, **orange** gift bags for all the attendees, **orange** program packets and more- creating an energetic and dynamic environment for the event!

Attendees left with tools and techniques to help them navigate and embrace change in their personal and professional lives, enabling them to thrive, lead and succeed. Feedback from the Forum was overwhelmingly positive, with attendees remarking on the relevance of the theme and the inspirational messages delivered by the speakers, as well as the tremendous opportunity to network and make new professional connections.



Every attendee also received a complimentary copy of “*Brave, Not Perfect: Fear Less, Fail More and Live Bolder, by Reshma Saujani*,” founder of Girls Who Code. The book’s message—about not being afraid to take chances—resonated strongly with the audience. The book shares powerful insights and practices to let go of the need for perfection and make bravery a lifelong habit.



Based on feedback from attendees, two **FREE** forum follow-up workshops will be held on:

- March 19 - **Cheryl Rice** – Three Keys to Empowerment
- May 13 - **Lisa Lord** – Where Do I Grow From Here?

The Foundation sincerely thanks all the companies and individuals who sponsored the Forum. This event would not be possible without their generous support.



The Foundation administers several scholarship funds, established by philanthropic donors.

The following scholarship funds distributed grants in 2019:

The **Norristown Area High School Star Scholarship** is a scholarship program created by the Roebuck Family Fund. Applicants must be either a graduating Norristown Area High School (NAHS) senior student or an NAHS graduate. Grants are awarded based on financial need and an academic performance of at least a 2.5 GPA. Nine students received scholarships totaling \$36,500 in 2019.

A scholarship program created by the **Carson Scholarship Fund**, established by John and Betty Carson is limited to NAHS graduating high school seniors, with a minimum GPA of 3.0 and with a curriculum focused on students in the STEM field, who have been accepted to an accredited four-year college and will be studying STEM courses. The 2019 recipient was Patricia Poley, who received a \$10,000 scholarship for Bucknell University. In addition, the 2018 recipient, Quinton M. Turner received a second year award of \$10,000 and the 2017 recipient, (Stephen) Yong Xiang Lin received a third year award of \$10,000.



2019
Patricia Poley



2018
Quinton M. Turner



2017
(Stephen)
Yong Xiang Lin

The **Edward H. Snow Scholarship Fund** applies to Lower Merion and Harriton High School seniors preparing to graduate who are seeking financial aid to complete their education at a two or four-year accredited college and are fully matriculated. Three students received scholarships totaling \$4,700 in 2019.

The **Marie N. Hansen Scholarship Fund** applies to a graduating senior at a Montgomery County High School and a Montgomery County resident, for at least one year, who will complete their education at a two or four-year accredited college and are fully matriculated. Two students each received a \$2,000 scholarship in 2019.



2018 Women and Leadership Forum Follow-Up Workshops:

Two free workshops for attendees of the 2018 Women and Leadership Forum were hosted by the Foundation in early 2019 at the Montgomery County Intermediate Unit in Norristown.

Back by popular demand, Raquel Arredondo's presentation **"Taking Charge of Your Professional Development Through Your Network"** was very well attended and generated a great deal of positive feedback.

Based on suggestions from Forum attendees for workshop topics, Dr. Terri Boyer, EDD, the founding director of the Anne Welsh McNulty Institute for Women's Leadership, and an associate professor of Education and Counseling at Villanova University presented **"Work-Life Balance"**. Workshop attendees left with tools to better manage the various demands of their time.

2019 Nonprofit Clinic:

The Nonprofit Clinic workshops focus on the support and capacity building of the nonprofit community. The series for 2019 was well attended and included the following presentations:

- How to Expand Your Donor Database – **Doug Schneider**, American Philanthropic
- How Savvy Marketing Translates to More Donations – **Beth Brodovsky**, Iris Creative Group
- Organizational Culture: It Will Eat Your Strategy for Breakfast – **Mehan McVety**, Capacity for Change
- Diversity and Inclusion Awareness – **Twana Harris**, Exude

A total of 578 individuals, ranging from various grassroots and nonprofit organizations to the Foundation's fiscal sponsee groups, convened at the Foundation's office in 2019 for everything from board meetings to strategic planning sessions. The larger community is welcome to benefit from the Foundation's training spaces and Boardrooms. Please contact the Foundation for more information.

TWANA HARRIS, EXUDE INC., PRESENTED ON DIVERSITY AND INCLUSION AWARENESS



National Philanthropy Day

November 15, 2019

On **National Philanthropy Day**, November 15, 2019, the Foundation announced the **2019 Critical Impact Award** honorees, Nanette and Kary LaFors. Nanette and Kary were selected for their efforts locally- and globally- to make a positive and meaningful difference in the community. **National Philanthropy Day** celebrates the extraordinary people who give generously of their time and resources to help people in need and improve lives. The award was presented to Nanette and Kary at the 2019 Women and Leadership Forum.



Nanette co-founded “*Advocates Against Hunger*” in 2008, with a mission to increase the visibility of food insecurity, and support and coordinate programs to address this important issue. In addition to their efforts to alleviate hunger in Montgomery County, Nanette and Kary have worked with “*Living Waters for the World*” to organize and lead international mission trips to install nine clean water systems for local communities.

The Foundation also recognized the contributions of nonprofit leaders in the County. The picture below features members of the Women’s Executive Director’s Roundtable, who play a vital role in the community.

This acclaimed pilot project was created in response to the 74% Initiative: A Conversation about Women in the Nonprofit Workplace event presented in December 2014 by the Foundation. While this was to be a one-year commitment, the Women’s Executive Directors’ Roundtable is now in its sixth, highly successful year. The Roundtable provides an invaluable opportunity for a truly diverse group of women executive directors to raise and address issues related to women in leadership within the region’s nonprofit sector within a confidential, vigorous, facilitated setting.

Women’s Executive Directors’ Roundtable



Our Role as a Community Catalyst

Fiscal Sponsorships

The Foundation serves as the **Fiscal Sponsor** for several organizations who have not yet been recognized as tax-exempt under the Internal Revenue Code as a 501(C)(3).

Fiscal Sponsorships in 2019 included:

- **Advocates Against Hunger**
- **Elder Access to Justice Roundtable**
- **Montgomery County Health Alliance**
- **Montgomery County System of Care Community Fund**
- **Your Way Home Montgomery County**

Your Way Home Montgomery County

Your Way Home Montgomery County's (YWH) mission is to make the experience of homelessness in Montgomery County rare, brief and non-recurring.

Since launching in 2014, homelessness in the County has been reduced by 47%, as a result of this public-private partnership. The Foundation assists YWH with grant applications to private foundations and the tracking/reporting of grant awards. The Foundation meets monthly with the YWH team for program updates and to explore potential sources of funding. In 2019, the YWH Initiative Fund awarded grants to **Access Services, ACLAMO, CADCOM, Carson Valley Children's Aid, Keystone Opportunity Center, Manna on Main Street, Pottstown Cluster of Religious Communities** and **Valley Youth House**.

Community Service

The Foundation collaborates with the community in a wide range of ways:

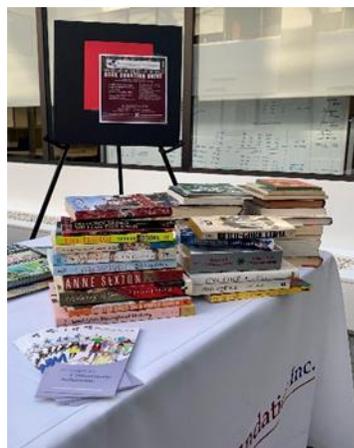
- A diverse spectrum of regional nonprofit groups meet at the Foundation including, **Advocates Against Hunger, Friends LifeCare** and **Your Way Home**.
- The Foundation President is a member and a Past President of the **Montgomery County Estate Planning Council**.
- The Foundation President serves on the Board of Trustees of **Friends LifeCare** and the **Montgomery Bar Foundation**.
- The Foundation President is a member of the **Rotary Club of Norristown**.
- The Foundation is a member of the **Council on Foundations, WIFS** (Women in Insurance and Financial Services) – **Philadelphia/Tri-County Chapter**, and **Philanthropy Network Greater Philadelphia**.
- The Foundation President and Vice President of Advancement are members of the **Montgomery County Chamber of Commerce (COC)**
- The Foundation Vice President of Advancement is a member of the **TriCounty Area COC**.
- The Foundation President serves on the **Your Way Home Advisory Council**.
- The Foundation is a Major Sponsor of the **Bucks-Mont Collaborative** annual seminar for professionals in the health and human services fields. The 2019 seminar's focus was on Trauma Informed Care. Over 250 professionals attended.
- The Foundation President is a member of the **Central Montgomery County Business and Professional Women's Club** and was named Woman of the Year in 2018.
- The Foundation President serves on the Advisory Board of **MontCo Hunger Solutions**.

A Look Inside The Foundation

Foundant Technologies

The Software of Philanthropy

In 2020, the Foundation will transition to Foundant's Community Suite, a complete, integrated software solution built for community foundations. The accounting system is integrated with the rest of the organization which allows for automatic data entry as people use the system. The **Donor Portal** allows fund holders to see real-time view of their account activity, without waiting to receive monthly or quarterly paper statements. The **Community Relationship Management** will allow the Foundation to connect with donors in more ways, and the **Events Management** will help streamline events with simple registration and payment.



Book Drive

The Foundation held a book drive at its offices in Blue Bell to support **Project HOME** in their new initiative: an online book store! Foundation staff and neighboring businesses contributed more than 200 books to support the drive. The Foundation was pleased to be a collecting point for this initiative, which will help Project HOME create more jobs.



The Seal of Excellence

The Foundation recently received re-accreditation with the nation's highest standard for philanthropic excellence and integrity. **National Standards for U.S. Community Foundations®** establish legal, ethical, effective practices for community foundations everywhere. The Foundation has been accredited by the National Standards since 2008.

Our Growing Team

The Foundation added two new members to its team in 2019!

Vibha Agrawal, Vice President of Advancement joined the Foundation with more than 25 years of experience in executive roles in marketing, public relations and fundraising with Fortune 500, start-up and non-profit organizations. **Yani Ortiz Suarez**, Administrator of Operations, brings experience in human resources and executive assistant positions. Welcome to the Foundation! They join a dedicated team, committed to serving donors and the community!



Foundation Team Members Clare Strenger, Vibha Agrawal, Ellie DeFrancesco, Virginia Frantz & Yani Ortiz Suarez pose with Nanette LaFors (Advocates Against Hunger) for some holiday fun!

Women's Leadership Council

The Foundation expresses its gratitude to members of the 2019 Women's Leadership Council for their invaluable contributions, insight and support – Beverly Boland, Marsha Bolden, Susan Buehler, Cindy Diccianni, Kathy Dwyer, Joanne Kline, Sonya Lewis, Julie Paoline, Missy Peart, Punam Sharma, Maryann Sweriduk, Cheryl Tatreau and Jocelyn Wright. **Thank you** for your outstanding planning efforts for the 2019 Women and Leadership Forum!

It was with heavy hearts that the Foundation bid farewell to Alma R. Jacobs, former PA Secretary of Aging, supporter of women, a lover of history, and a philanthropist. Alma served as Chairperson for the Women's Leadership Council for almost five years. She will be missed but never forgotten.

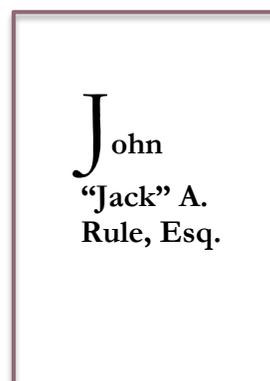
New Board Members!

A Warm Foundation Welcome To
Our Newest Board Members
Kate Harper And Jack Rule



Catherine
M. "Kate"
Harper, Esq.

Catherine M. "Kate" Harper, a partner at Timoney Knox since 1997, was also a member of the Pennsylvania General Assembly in the House of Representatives, representing eastern Montgomery County for eighteen years. Kate has a general practice, but focuses on land use (particularly municipal, conservation and zoning law), real estate and civil litigation in Southeastern Pennsylvania. She handles commercial litigation, contract disputes and employment law matters for entrepreneurs, families and small businesses.



John
"Jack" A.
Rule, Esq.

Mr. John "Jack" A. Rule is a shareholder in the firm of Miller, Turetsky, Rule & McLennan, of Collegeville, Pennsylvania. He practices in the areas of Disability and Special Needs Planning, Business Associations, Nonprofit Organizations, Business and Estate Planning, Real Estate, Estate and Trust Administration, Taxation and Asset Preservation. Jack is a member of the Montgomery and Pennsylvania Bar Associations and has served as a director of the Montgomery Bar Association.

Helping Donors Achieve Their Philanthropic Dream!

Your donation can make a difference in many ways. You can start your own fund or add to one of 58 existing funds that are changing lives every day in the community. Ways to make an impact:

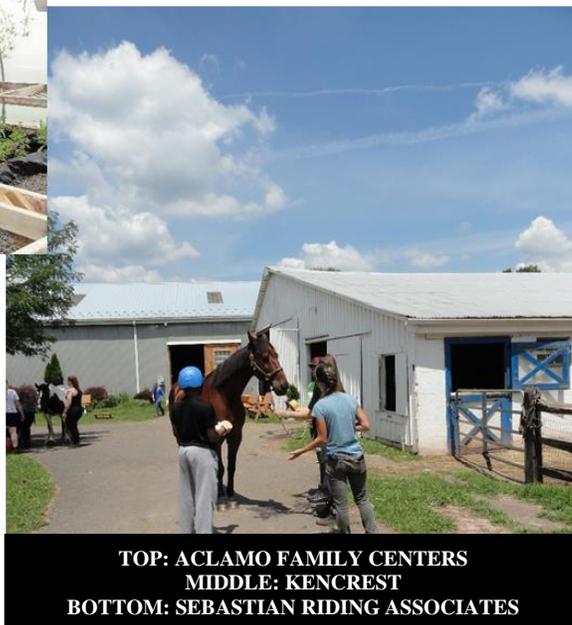
1.

Donor-Advised Funds: You have ongoing involvement with your gift. You work with our staff to identify the causes you care about most. **Lucy Belle's Rainbow Fund** made a grant to the Children's Hospital of Philadelphia to facilitate therapeutic activities for children living with cancer, and to support brain cancer research.



3.

Scholarship Funds: Invest in the community's future and educational health. Funds like the **Carson Scholarship Fund** allow bright and deserving students to pursue their goals. In 2019, the Foundation granted \$73,200 to 17 recipients.



TOP: ACLAMO FAMILY CENTERS
MIDDLE: KENCREST
BOTTOM: SEBASTIAN RIDING ASSOCIATES

4.

Designated Funds: Direct your gift to a specific nonprofit agency. The **MBF Center Fund** supports charitable organizations that improve the quality of life for people with physical disabilities, including education and training in computer studies and related fields.

5.

Unrestricted Funds: Your gift will allow the Foundation to continue to do its work, and provide support where it's needed most in the community. One example: The Foundation's **Nonprofit Clinic** provides a series of educational workshops on vital issues cost-free to nonprofit agencies.

2.

Field of Interest Funds: Target your gift to address needs in an important area of community life. Individual donors established the **Your Way Home Fund**, which provides funding for basic needs that go toward making homelessness rare, brief and non-recurring in Montgomery County. Since 2014, this initiative has reduced homelessness by 47%.



The
Montgomery County Foundation Inc.
Inspiration...Collaboration...Impact

2019 Board of Directors

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